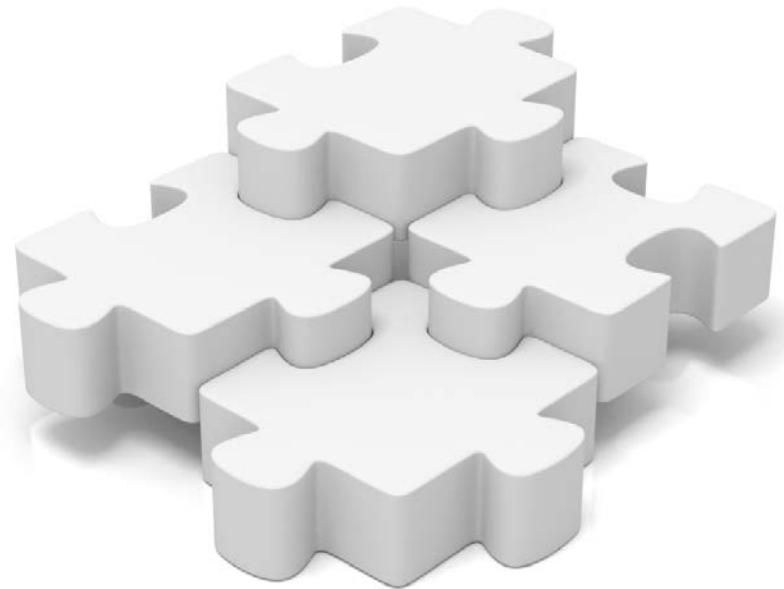




Town of Erin Operational Review

Final Report

June 2015 *Version 4.1 June 17, 2015 WMF/JM*



About this Document

In October 2014, the Town of Erin (“the Town” or “Erin”) engaged StrategyCorp to work with the Town in conducting an Operational Review (the “Study”). The engagement was procured using a public, competitive process.

This report is the final deliverable in StrategyCorp’s work on this engagement. This document is comprised of four parts:

1. An Executive Summary, with key findings and recommendations from the Operational Review;
2. The Report section is StrategyCorp’s final report and contains findings from the Operational Review. It provides a brief overview of the process undertaken, and outlines StrategyCorp’s recommendations; and,
3. Appendices.

Statement of Due Diligence

The recommendations contained within this report used interviews, appropriate research and analysis within the scope of the engagement and was supported by decades of relevant experience on the part of the StrategyCorp team in working with municipalities and other governments.

StrategyCorp's recommendations are informed opinions on these topics, but any final decisions properly rest with elected representatives and management. The Town should conduct its own due diligence and verification in order to ensure optimal outcomes, both in adopting and in implementing any of the following recommendations.

Acknowledgements

StrategyCorp wishes to acknowledge and thank Mayor Al Alls and the Members of Town Council, and Chief Administrative Officer / Town Manager Kathryn Ironmonger, for entrusting this important and interesting assignment to StrategyCorp. Without their ongoing support and willingness to participate where requested, the Study's results would not have been as successful.

StrategyCorp also wishes to acknowledge the important role played by Town staff at all levels and in all departments. The participation of Town staff at the 'working levels' has added to the quality and currency of the Study and made it a learning exercise for all concerned. Without the efforts of the "SCOPE Task Force" of Town staff and the involvement of staff from all levels in the Town organization, the Study would not have been able to achieve the results produced.

More importantly, the exposure to the methodology and experience of the Operational Review by Town staff from all departments forms a solid basis for future continuous improvement projects and initiatives. These can be advanced across the Town organization in the months and years to come.

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Executive Summary

Findings, conclusions and recommendations...

What are the strengths, weaknesses and opportunities for the Town of Erin, as a municipal organization?

1. *Strengths...*

- *Town staff have a wealth of experience and knowledge*
- *The size of the staff complement is generally in line with other, similar organizations; to the extent that it can be determined, the Town appears to be in the “middle of the pack” in terms of municipal performance for municipalities of similar size, budget and responsibilities*
- *Town staff are dedicated to municipal service and they want to serve the community. Across the organization, they have many useful and innovative ideas for improvements. They view the new Council term as kindling a renewed spirit of cooperation and improved customer service.*

2. *Weaknesses...*

- *The “metrics” to guide a well-functioning municipal, service-delivery organization are not readily available*
- *While staff is dedicated to good service-delivery, that does not always translate into an openness to change or a willingness to implement new processes*
- *Deferred maintenance and capital works are major challenges for the municipality in the foreseeable future*

Findings, conclusions and recommendations...

What are the strengths, weaknesses and opportunities for the Town of Erin, as a municipal organization?

3. Opportunities...

Continuous Improvement

- *With the exception of a few key areas that have been outlined in this Study, the operational changes recommended in this Study aim for continuous improvement to generally well-functioning programs and departments. (Of course, performance improvements may require changes in job-content, business processes or organizational structure, which may prove disruptive or unwelcome by some of those affected, especially in the near term).*
- *Over time, there will also be need to develop new community and service-delivery partnerships, and to engage new personnel in areas where in-house expertise is insufficient to meet future challenges facing the Town.*

Taking a “One Erin” approach

- *There remains a legacy of amalgamation in the way that the Town of Erin organizes its service delivery, retains its records, develops its policies, and views customer service.*
- *The Town of Erin is not a large municipality and its resources are limited. There would be real merit in looking at most areas of service delivery from a “One Town” perspective.*

Findings, conclusions and recommendations...

What are the strengths, weaknesses and opportunities for the Town of Erin, as a municipal organization?

3. *Opportunities...*

Productivity Improvement Targets

- *In any public sector organization, the best way to improve performance and contain costs is to set a realizable and realistic, multi-year productivity improvement target, and work towards achieving it in all operating activities and capital works functions.*
- *It is StrategyCorp's view that – using a continuous improvement methodology – the Town should set for itself a productivity improvement target. A realistic goal would be perhaps 3% of the gross Operating Budget for each of the next three years. These “savings” can be used to absorb the impact of inflation on costs, tax rates and water rates, or to be ear-marked to meet deferred maintenance and facilities maintenance obligations.*
- *The 3% target is, however, not to be confused with a 3% net reduction in the budget or in taxes. Each year, Council and staff reduce the gross requirements of municipal operations as part of the preparation of the annual budget. It is rather a goal that is set at the beginning of the process, to focus on productivity and cost-saving opportunities*

Findings, conclusions and recommendations...

StrategyCorp's recommendations fall into three categories:

- Service standards / “metrics”
- Continuous improvement
- Organizational and process improvements

While the specifically recommendations are generally grouped by function to facilitate analysis and implementation, and the numbers below relate to those sections, our recommendations can be allocated to the three main categories referenced above:

Service Standards / “Metrics”:

2: Review and establish existing service levels, budget to meet those approved service levels, and develop the capacity to manage against those targeted and budgeted service levels.

7a: To support the effort to establish service standards and metrics, and to improve management capacity and control, adopt improved financial management systems

Findings, conclusions and recommendations...

Continuous improvements:

3a: Greater efficiency and program effectiveness in building, planning, water and economic development

3b: Improve processes for fill permits, property standards enforcement, burning permits, etc.

3c: Incorporate better system-standards for municipal services to new properties, including more rapid additions to the tax roll

3d: Improve customer service and staff efficiency through a redesign of the 'front office', including customer-facing services and associated staff duties and work flow

4: Improve staff competence and efficiency through an integrated, consistently applied program of staff development, performance evaluation, succession planning, and continuous improvement

5b: Improve fairness and promote voluntarism through a standardized, regularly reviewed fee structure, with improved processes for collecting and tracking bookings and associated fee revenues;

7: Improve administrative operations, including:

b) Records management and storage

c) Management systems and communications

d) Better IT support to Town operations, in both timeliness and application / software support, and to aid contemporary customer-services

Findings, conclusions and recommendations...

Organizational and process improvements:

1: Combine maintenance activities of Roads, Water and Parks

3e: Creation of an 'advocate' within the staff complement to advocate and expedite worthwhile economic investments

5a: Management and Operations – including:

- Single overall management responsibility for recreation activities / facilities across the Town;
- Distinguishing 'outside' maintenance activities from facilities operation and recreation activities

5c: Over time, consider greater integration of major Town recreation and leisure facilities, when existing facilities reach the end of their useful lives or require major refurbishing, including the participation of other public authorities, voluntary groups and complementary private entities

6: Greater consolidation facilities management, asset management and fleet management responsibilities, across all departments, to create a "One Erin" approach to service delivery and use of equipment / facilities



Project Overview

StrategyCorp's Operational Review Methodology

- In partnership with the Town of Erin, StrategyCorp has undertaken an Operational Review of the Town's departments and programs. This review has focused on program and service improvements that align with the Town's operational and strategic objectives, including the newly elected Council's 2015 Budget priorities and the existing 2014 Strategic Plan.
- The Study began with a round of consultations with political leadership and senior management at the Town.
- The Operational Review included the creation of an Erin "SCOPE Task Force", which included staff representatives from a cross-section of Town departments and functions. Our goal has been to ensure that the Study considered all aspects of the Town's operations and to promote a commitment to continuous improvement among Town staff at all levels. The SCOPE Task Force met on several occasions, and its members undertook specific assignments between meetings. As the Study continued, senior management was periodically briefed on progress and invited to comment and make suggestions.

StrategyCorp's Operational Review Methodology

- Working-level staff were asked to present and debate their views with their peers from other departments. The conclusions and findings of the SCOPE Task Force were summarized and reviewed with the Task Force by StrategyCorp. StrategyCorp staff analyzed the observations and findings of the Task Force in light of our own expertise and many years of municipal experience in variety of municipalities of all sizes.
- StrategyCorp's goal and approach has been to 'add value' to the observations collected in the earlier phases of the Study, from the Mayor and Councillors, senior staff and, notably, by the SCOPE Task Force. In part, that has involved senior staff from StrategyCorp determining the significance of the findings in meeting the Study's main objectives.



Operational Review Objectives

- The objectives of the Operational Review were outlined in the Town’s Request for Proposals (RFP), and further clarified between StrategyCorp representatives and the Town through subsequent communications.
- The Operational Review followed the Town’s recently completed 2015-2020 Strategic Plan, which identified a series of issues faced by the municipalities at a corporate level in the near and longer-term, including:
 - Capital Challenges;
 - Drinking water legislation compliance;
 - Recreational facilities standards;
 - Creation of an asset management plan; and
 - Highway maintenance.
- The objectives included in the RFP have formed the basis upon which StrategyCorp has conducted its Operational Review, which include:
 - Confirmation that existing policies, practices and program delivery reflect “best practice”;
 - Identification of areas of efficiency;
 - Identification of opportunities for synergies;
 - Assessment of resource needs; and,
 - Analysis of the viability of Town services in their current state.

Project Approach & Targets (1 of 2)

When this Project began, Town Council asked StrategyCorp to examine whether the Town, as a municipal organization, is in a position to take-on the challenges that face Erin in the foreseeable future, including meeting capital investment needs and accommodating growth.

Based on its experience, StrategyCorp does this evaluation by assessing the strengths and weaknesses of the existing organization, and the potential for operational improvements.

Operational improvements on their own will not solve or overcome the financial and development challenges that face the Town of Erin, or any other municipality. But a well functioning municipality, with a foundation of efficiently and effectively delivered local services is the essential foundation for doing more in the future.

In addition, operational improvements can make it possible to absorb the impact of inflation and to avoid diverting resources away from emerging needs, simply to maintain existing levels of municipal services and asset maintenance.

Project Approach & Targets (2 of 2)

Making operational improvements is neither a slash-and-burn exercise nor a one-time event: it is a process of productivity improvement and continuous improvement.

To be successful, a municipality must have access to the information that it needs to track projects and activities efficiently and accurately. StrategyCorp's analysis is materially aided by good data on the functions and processes that it is evaluating. Without good data, we must rely more heavily on subjective analysis and analogous experience elsewhere.

To gauge and guide operational improvements, it is necessary to have "metrics" or the ability to collect and to analyze the connection between resources invested in a function (people, money, material, information) and the results that are achieved. Without "metrics", you can't decide if you are doing as well as you could, nor whether what you are spending is reasonable, in comparison to the results that you (and your peers) achieve.

Or, in the memorable phrase from the "Reinventing Government" movement, "What you can't count, you can't measure, and what you can't measure, you can't manage."

Strengths, weaknesses and opportunities...

What are the strengths, weaknesses and opportunities for the Town of Erin, as a municipal organization?

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Key Parameters of Success

StrategyCorp has established four key parameters to measure the success of operational reviews. These parameters were used to evaluate program and service delivery:

1. **Better service-delivery and “customer” satisfaction (“better services”):** Improved quality and range of municipal services for residents, communities and businesses, including agriculture. Meeting the needs and expectations of citizens and businesses, especially the clients and potential clients of Town services.
 2. **Greater operational integration (“synergies”):** Greater integration and harmonization of municipal functions at the Town, and with other municipal and community service-delivery partners. “Breaking down silos”, both organizational and operational.
 3. **Improved efficiency and productivity (“savings”):** Cost-avoidance and savings through productivity improvements and changes in program-delivery, while avoiding proposals for significant reductions in programs, levels of service, or staffing.
 4. **Strengthened decision-making (“good management”):** Better governance and more efficient decision-making. Strengthened / improved policy-making and operational management, including financial management and human resources management. Better internal communications.
- StrategyCorp has used these ‘parameters for success’ in shaping its recommendations. We also believe that our recommendations substantively meet the Town’s own parameters for project success.



StrategyCorp Findings & Recommendations

Organizational Overview (1 of 2)

- The Town of Erin is home to approximately 11,800 residents, and is located in Wellington County. The Town was amalgamated in 1998, with the joining of the communities of Erin and Hillsburgh, six hamlets, and the surrounding rural area. After a decade-and-a-half since amalgamation, it is timely to review the degree to which services have been integrated, both to serve all of the communities within the municipality, but also to promote the concept of a single Town of Erin municipality (“One Town”), serving all communities equally and efficiently.
- Town Council consists of a Mayor and four Councillors, who were most recently elected in October 2014 for a term of four years. The Town’s local government provides a full range of local, community-based services, including:
 - Recreation, Parks and Open Space;
 - Fire and Emergency services;
 - Potable water;
 - Roads, bridges and storm drainage;
 - Building services, By-Law Enforcement and Property Standards;
 - Planning services at the local level, including promotion of Economic Development; and,
 - Corporate functions: Clerk’s / Support to Mayor and Council, Customer-service Reception, Administration, Finance, Information Technology, and Asset Management.
- With its community and governmental partners, the Town also facilitates or sponsors the delivery of a range of other community programs and services, for the benefit of residents and taxpayers
- Like many municipalities, the Town’s organizational structure has some distinctive features, some of which are a legacy of amalgamation.
- The “Public Works Department” referenced in the Town’s website is really two organizational units: the Roads Department, headed by a Superintendent, and the Water Service, presently headed by an acting Superintendent.

Organizational Overview (2 of 2)

- Likewise, the “Recreation Department” effectively functions as two entities, one based Hillsburgh and revolving around the arena there, and one based in the village of Erin, revolving around the Centre 2000 complex and related outdoor recreational and parks facilities. As in any municipal ‘recreation’ department, there are activities associated with recreation programs and facilities (such as arenas), and those associated more with parks and open space, like playing fields, playgrounds, trails and other public open space.
- To avoid confusion, this Study will use the terms Roads Department, Water Department and Recreation Department, recognizing that this may be imprecise in some situations.
- Finally, the Town has contracted for the services of an Economic Development coordinator, on a time-limited basis, and recently entered into a contractual service-delivery arrangement with the County, to provide a suite of land-use planning services formerly provided by the Town directly.
- Like most municipalities in Ontario, the Town of Erin continues to navigate through fiscal challenges. It must constantly work to improve quality of service and value for taxpayer dollars.
- While growth is an issue on the horizon for Erin, the impact of growth is not yet significantly affecting things like subdivision plans and zoning applications, development charges revenues, development-related capital works, and water-system hook-ups. These lie ahead, some after the SSMP work is completed.
- The Town’s Strategic Plan, adopted by the previous Council but targeted for the 2015-2020 time horizon, identified three pillars of priority to support its future growth:
 - **Organizational Effectiveness** : Maximizing the effectiveness of the municipal administration, quality customer service, corporate resilience and learning, and effective corporate management practices;
 - **Resource Management**: Financial strength and viability, infrastructure planning, public safety, fire and emergency services; and,
 - **Community Capacity Building**: Building an engaged and involved community, building a strong local economy, etc.

Project Findings (1 of 3)

Legacy issues and modernization

In common with other amalgamated municipalities in southern Ontario, Erin has a pre-amalgamation municipal legacy, from the infrastructure and by-laws that it inherited, to the way in which services are organized and delivered to the larger population.

Erin has likewise experienced incremental evolution on that amalgamated foundation, as its financial information systems, municipal fleet and land-use planning policies developed over the past decade-and-a-half.

Finally, there is need to modernize tools and processes on which both Council and staff rely to develop and administer budgets, to measure performance and to decide priorities.

The result of these ‘legacy’ issues is predictable:

Where there are no well-established and “costed” service-standards, results are uneven, often not prioritized across the municipality and likely involve some misallocation of staff and financial resources. There is a corresponding unevenness in outcomes, disagreement on perceptions of effectiveness and efficiency, and perhaps even a ‘disconnect’ between public priorities and municipal effort.

Project Findings (2 of 3)

In summary terms, StrategyCorp believes that a series of reforms should produce outcomes that are both verifiable and recognized for their value by Town Council, residents and business operators in Erin.

“Metrics” / Service Standards

First, the Town must invest in better financial information systems and processes, and participate in inter-municipal benchmarking programs. With knowledge, comes the power to make things better. Existing services can be accurately described, their level established, and their full-cycle cost spelled-out. Service standards also make it much clearer to Council what it costs to enhance a service and what can be saved if a service is reduced.

Service standards also highlight:

- The important distinction between ‘starving’ a service with a budget cut, or a sustainable reduction in a service
- When staffing costs rise due to more or better service, or because of inattentive management of staff, equipment or contractors
- The opportunity to institute or raise fees to compensate for service levels that exceed the accepted community standard

Project Findings (3 of 3)

Second, the Town should use its enhanced knowledge of service-delivery and its cost to develop service standards. Clearly described and accurately priced units of service allow Council to set priorities. Council can much more easily and accurately determine minimum or optimal levels of service. It can also decide the appropriate fees or turn-around times for some services, particularly for specific clienteles or where a service exceeds the municipal standard.

Continuous improvement

Third, StrategyCorp, with the help of the SCOPE Task Force, has identified a broad range of improvements in the delivery of municipal services, the administration of programs, and improvements to customer service. These recommendations include both large and small improvements. They would also form the basis for adopting a program and methodology of continuous improvement, to serve residents and taxpayers on an ongoing basis.

Organizational Improvements

Finally, processes and organizational arrangements can make service-delivery better and control costs, or they can be an obstacle to those objectives. While an Operational Review is not an Organizational Review, operations can be improved with the application of talent, streamlining and synergy. StrategyCorp has made a number of suggestions to break-down the silos that exist in any organization, and to benefit from the cost-saving and effectiveness benefits that come from good managerial controls and professional expertise. In a small organization like Erin, there are good reasons to pool resources and talent.

Project Recommendations (Summary, 1 of 3):

StrategyCorp's recommendations fall into three categories:

- Service standards / “metrics”
- Continuous improvement
- Organizational and process improvements

While the specifically recommendations are generally grouped by function to facilitate analysis and implementation, and the numbers below relate to those sections, our recommendations can be allocated to the three main categories referenced above:

Service Standards / “Metrics”:

2: Review and establish existing service levels, budget to meet those approved service levels, and develop the capacity to manage against those targeted and budgeted service levels.

7a: To support the effort to establish service standards and metrics, and to improve management capacity and control, adopt improved financial management systems

Project Recommendations (Summary, 2 of 3):

Continuous improvements:

3a: Greater efficiency and program effectiveness in building, planning, water and economic development

3b: Improve processes for fill permits, property standards enforcement, burning permits, etc.

3c: Incorporate better system-standards for municipal services to new properties, including more rapid additions to the tax roll

3d: Improve customer service and staff efficiency through a redesign of the 'front office', including customer-facing services and associated staff duties and work flow

4: Improve staff competence and efficiency through an integrated, consistently applied program of staff development, performance evaluation, succession planning, and continuous improvement

5b: Improve fairness and promote voluntarism through a standardized, regularly reviewed fee structure, with improved processes for collecting and tracking bookings and associated fee revenues;

7: Improve administrative operations, including:

b) Records management and storage

c) Management systems and communications

d) Better IT support to Town operations, in both timeliness and application / software support, and to aid contemporary customer-services

Project Recommendations (Summary, 3 of 3):

Organizational and process improvements:

1: Combine maintenance activities of Roads, Water and Parks

3e: Creation of an ‘advocate’ within the staff complement to advocate and expedite worthwhile economic investments

5a: Management and Operations – including:

- i. Single overall management responsibility for recreation activities / facilities across the Town;
- ii. Distinguishing ‘outside’ maintenance activities from facilities operation and recreation programming

5c: Over time, consider greater integration of major Town recreation and leisure facilities, when existing facilities reach the end of their useful lives or require major refurbishing, including the participation of other public authorities, voluntary groups and complementary private entities

6: Greater consolidation facilities management, asset management and fleet management responsibilities, across all departments, to create a “One Erin” approach to service delivery and use of equipment / facilities

Summary Recommendations for the Town of Erin (1 of 2)

- Following the Operational Review, StrategyCorp recommends seven (7) overall operational improvements, each with a number of specific action steps:

StrategyCorp Operational Review Summary Recommendations:

1. Combine maintenance activities of Roads, Water and Parks
2. Review and establish existing service levels, budget to meet those approved service levels, and develop the capacity to manage against those targeted and budgeted service levels.
3. There is need to continue recent efforts to improve staff-level customer service and the municipality's business climate; among the measures needed are:
 - a) Greater efficiency and program effectiveness in building, planning, water, and economic development
 - b) Review processes for fill permits, property standards enforcement, burning permits, etc.
 - c) Incorporate better system-standards for municipal services to new properties, including additions to the tax roll
 - d) Redesign of 'front office' / customer-facing services and associated staff duties
 - e) Creation of an 'advocate' or 'champion' within the staff complement to advocate and expedite worthwhile economic investments
4. Initiate an integrated, consistently applied program of staff development, performance evaluation, succession planning, and continuous improvement

Summary Recommendations for the Town of Erin (2 of 2)

StrategyCorp Operational Review Summary Recommendations:

5. Integrate and streamline the Recreation functions in the Town:
 - a) Management and Operations – including:
 - i. Single overall management responsibility for recreation activities / facilities across the Town;
 - ii. Distinguishing ‘outside’ maintenance activities from facilities operation and recreation programming
 - b) Standardized, regularly reviewed fee structure, with improved processes for collecting and tracking bookings and associated fee revenues;
 - c) Over time, consider greater integration of major Town recreation and leisure facilities, when existing facilities reach the end of their useful lives or require major refurbishing, including the participation of other public authorities, voluntary groups and complementary private entities
6. Greater consolidation facilities management, asset management and fleet management responsibilities, across all departments, to create a “One Erin” approach to service delivery and use of equipment / facilities
7. Improve administrative operations, including:
 - a) Improved financial management systems
 - b) Records management and storage
 - c) Management systems and communications
 - d) Better IT support to Town operations, in both timeliness and application / software support, and to aid contemporary customer-services

1. Combine maintenance activities of Roads, Water and Parks (1 of 5)

Background and Consultations

- During the work of SCOPE Task Force, as well as in the interviews with the Mayor and Councillors and senior staff, opportunities for improved performance were identified related to coordination of the operational activities of water, roads and recreation (parks). They use similar equipment, contract for similar equipment suppliers, and many of the staff are capable of performing a range of similar maintenance activities.
- Despite the identified opportunity, past practice and current organizational and managerial arrangements contribute to each department making decisions about maintenance activities and equipment use independently, without coordination and without pre-determined priorities
 - This was identified as a source of additional cost and lost opportunity to share costs and fully utilize employees, both based on priorities and during non-peak times.
 - This lack of in-depth support is especially a risk to the Town in the area of response to water system failures, and to keeping costly deferred maintenance liabilities within manageable range

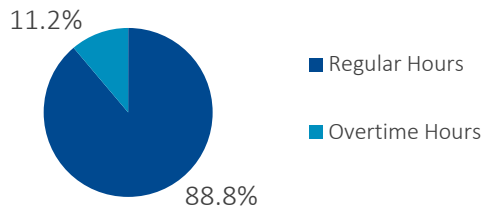
Analysis

- Upon review of four neighbouring jurisdictions to the Town, we have observed that it is standard practice to combine roads and water/wastewater functions into a combined public works department:
 - The Township of Puslinch has a Public Works Department, which is responsible for maintenance of Township roads, storm sewers, storm water management, streetlights, sidewalks, streetscape, and development standards.
 - Centre Wellington has a joint Infrastructure Service Area, led by a managing director of Infrastructure Services, with a Superintendents of Environmental Services (water/wastewater), Superintendent of Public Works (roads), and an Engineering Technologist.
 - Guelph/Eramosa Township has a Public Works Department, combining roads and water/wastewater services.
 - East Garafraxa has a Department of Roads and Waste Management (does not provide water/wastewater services in-house).

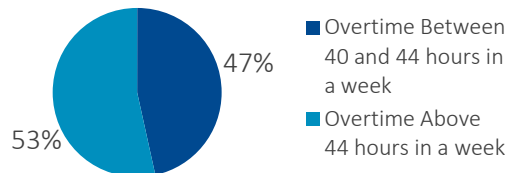
1. Combine maintenance activities of Roads, Water and Parks (2 of 5)

- When the Erin “Roads” function is compared to Puslinch, Guelph/Eramosa, and Centre Wellington, Erin places in the middle. This suggests that Erin’s roads maintenance operations are generally well-run and are not in need of major operational overhaul (see recommendation #2 for more in-depth Roads department analysis).
- When the Erin “Water” function is compared to Guelph/Eramosa and Centre Wellington, Erin was average in cost/capita. As a municipality without municipal wastewater services, the Town’s own analysis indicates that the Town’s cost of water services (as reflected in its water rates) is in the top quartile among Ontario municipalities. It is crucial to note, however, that the Town is following the progressive, Ministry-promoted approach of “full-cycle costing” of water systems. In the years to come, other municipalities can be expected to follow Erin’s lead to progressive asset management in the water service.
- **Overtime, Scheduling and Labour Sharing:** Using a detailed analysis produced by Erin’s finance department, StrategyCorp reviewed the Roads Department employees’ weekly schedules for the winter of 2014/2015. Our aim was to examine whether the Roads Department (and indeed all maintenance activities) might benefit from improved scheduling and/or increased resource sharing.
 - If the data on which the analysis is based is correct, it would appear that roughly 11% of the roads department’s hours worked for the 2014/2015 winter season (November 3rd, 2014– April 2nd, 2015) were overtime hours.
 - Of these overtime hours, nearly half (47%) were overtime hours that fell between 40 and 44 hours in an employee work-week, while 53% of overtime hours billed were for hours worked by employees beyond 44 hours in a week.

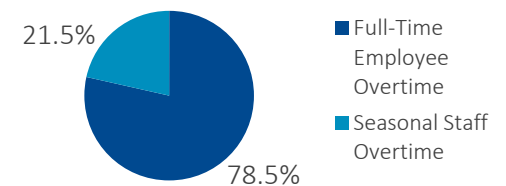
Roads Department Hours Breakdown – Winter 2014-2015



Roads Department Overtime Hours Breakdown by work-week duration – Winter 2014-2015



Roads Department Overtime Hours Breakdown: Full-Time vs. Seasonal Staff – Winter 2014-2015



1. Combine maintenance activities of Roads, Water and Parks (3 of 5)

- Of the overtime hours worked during the winter of 2014/2015, the staff schedule revealed that more than three-quarters (78.5%) were worked by full-time employees, suggesting seasonal employees may not have been fully utilized.
 - This finding was further supported by the fact that approximately 16% of overtime hours were overtime hours worked by full-time employees that could have been regular hours worked by seasonal employees who had worked less than 40 hours in that week under optimized scheduling conditions.
 - For example, if a full-time employee worked 55 hours in a week (15 overtime) and a seasonal employee worked only 30 hours in that week, 10 of those hours, under optimal scheduling, could have been worked by the seasonal employee and treated as regular hours.
 - Given the roads overtime cost in 2013 was nearly \$96,000, and was roughly \$87,000 in 2014, reductions in overtime of approximately 16% through schedule optimization would result in not insignificant savings for the Town.
- If the Town were to adopt Ontario Ministry of Labour guidelines for “overtime after 44 hours”, it could optimize the scheduling of staff to reduce unnecessary overtime hours when seasonal employees are available at regular rates. Effectively managed, there is a potential productivity-based saving of more than 50% of the Roads overtime budget, each year.*
 - These hours would be treated as regular hours, and would be more evenly distributed among full-time and seasonal roads operators.
- In total, assuming roads overtime hours are charged at 1.5x normal hours, and winter season hours remain roughly in-line with 2013 and 2014, this could translate into as much as \$12,000-\$20,000 in savings each year depending on weather conditions.
 - Of course, there are operational considerations related to skill-level, adequate supervision, network knowledge and weather conditions, and these must be weighed against the potential to reduce costs.
- As a side note, to benefit from industry best practices in winter maintenance moving forward, the Town may wish to consider the best practices provided by the Ontario Good Roads Association’s guidelines in relation to developing a level of service policy for winter maintenance, preparing for and decommissioning winter operations, and winter weather monitoring.

** Calculated as 47% saved via a policy change to grant overtime after a 44 hour work-week, instead of the current 40 hours; plus 16% in savings via improved scheduling, using the winter of 2014/2015 as a guide. This would have resulted in a reduction in overtime hours of 62% for the winter of 2014/2015. Therefore, 50% to 65% is used to be conservative in our estimates, as weather conditions vary from year to year*

1. Combine maintenance activities of Roads, Water and Parks (4 of 5)

Commentary

- In doing the inter-municipal comparisons, it should be noted that Erin's current population and level of activity is relatively smaller in relation to some of its neighbours. With that in mind, there is less need for segregation of duties among roads, water and parks maintenance activities.
- Even larger, progressive municipalities have identified operational efficiencies from placing all 'outside' maintenance activities under single overall management (e.g., City of Burlington's "Roads and Parks Maintenance Department" is responsible for the maintenance of parks and playgrounds, streets, sidewalks and storm sewers; traffic and street lights; municipal and heritage cemeteries; forestry, snow clearing, traffic signs and creek maintenance. As a municipality, Erin is too small to take a "siloes" approach to delivering these services and there are few operational advantages to segregating them. The Town should concentrate on doing a good job on the full range of maintenance activities.
- The Town should find ways to give better priority and managerial direction on capital projects, especially involving civil engineering and fleet management. This may argue for a 'director' with engineering or engineering technology training and experience, with overall responsibilities for all maintenance and capital works activities. The Town necessarily spends a considerable amount each year on first-rate engineering consulting services, for a variety of tasks ranging from roads to water, and from projects (e.g., SSMP) to policy advice. Some of those costs would be reduced and controlled with in-house engineering expertise. In-house expertise can also contribute to more efficient use of external engineering services and project management. There may also be ways in which the County's well resourced engineering department could play a greater role in areas like capital construction and project coordination.
- In addition, the Town's operations would benefit from greater pooling of resources and more integrated work-planning and scheduling. Overall management of all 'outside' operating functions (water, roads, parks / open space) could yield significant savings in overtime and in better deployment of contracted services. This could also achieve savings in the area of customer service, as customer service resources could be pooled to provide support for all maintenance-related activities at the Town.

1. Combine maintenance activities of Roads, Water and Parks (5 of 5)

- It should be noted that implementation of improved scheduling practices and sharing of resources would require improved financial systems, which could provide for better tracking and increased scheduling flexibility (see recommendation 7a for more detail on financial management systems).
- At a minimum, all maintenance functions should be under a single overall direction, even if water, roads and parks/recreation continue as distinct, but coordinated operating units.

Recommendations

1. That the Town combine maintenance activities of Roads, Water and Parks into one Town 'Operations' Department, with the name to be determined by the Council on recommendation from the CAO;
2. That either before or after combining maintenance functions, the Town should review opportunities to streamline staff scheduling in the Roads Department and perhaps related departments, with a view to reducing overtime hours; and
3. That the Town give consideration to hiring either a Town Engineer, or an experienced senior manager with training in engineering technology and project management, to oversee both public works and 'parks' operations and capital works, including the SSMP project, the completion of the water network in urban and developing areas, and the upgrading and completion of the rural roads network.

2. Review and establish existing service levels / resource allocation; identify opportunities to rationalize service delivery (1 of 4)

Background and Consultations

- During the SCOPE Task Force meetings, concerns were raised about the capacity of the roads department to adequately provide for capital works projects while maintaining ongoing roads maintenance activities.
- Consultations revealed that the roads department was effectively forced to delay capital works projects in favour of more pressing maintenance requirements, thereby deferring capital upgrades and increasing the ultimate cost of capital rehabilitation.

Analysis

- When comparing Erin with its peers in terms of roads adequacy, it appears that the Town's transportation infrastructure has suffered from deferred maintenance, with less than half of Erin's paved roadways, and only one quarter of bridges and culverts, being rated in good to very-good condition.

Transportation Capital Indicators 2013 MPMP Data	Puslinch	Guelph/ Eramosa	Center Wellington	East Garafraxa	Town of Erin	Average	Erin as a % of Average
Adequacy of Roads: % of paved lane kilometres where the condition is rated as good to very good	46.3%	56.3%	N/A	85.7%	47.5%	59.0%	80.6%
Adequacy of Bridges and Culverts: % of bridges and culverts where the condition is rated as good to very good	60.9%	93.3%	N/A	100.0%	25.0%	69.8%	35.8%
Effective Snow and Ice Control for Winter Roads: % of winter events where the response met or exceeded locally determined municipal service levels for road maintenance	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2. Review and establish existing service levels / resource allocation; identify opportunities to rationalize service delivery (2 of 4)

Commentary

- Upon reviewing Erin’s roads program, we believe the Town is well positioned to continue providing roads maintenance services at a competitive price for taxpayers. The issue of capital maintenance, however, requires attention, as the Town’s roads, bridges and culverts are generally not in a state of good repair.
 - The findings of the October 2013 County of Wellington Bridge Study, conducted by OGRA and RCCAO, further emphasizes this point. The study found that 17 of Erin’s 48 bridges and culverts reviewed were in need of imminent replacement, with an additional five requiring replacement over the next ten years.
 - The study estimated that the cost of proper life-cycle maintenance of Erin’s bridges and culverts would cost roughly \$10 million over the next ten years and \$55 million over the next 50 years.
- The Town is not sufficiently equipped to handle the full task of roads capital management, and like many smaller municipalities relies heavily on the services of consulting engineers and contractors. We recommend that Town explore the feasibility of the County assuming greater responsibility for roads jurisdiction or roads capital projects, in exchange for the Town assuming additional roads maintenance responsibilities, both directly and through its contractors.
- In addition, the Town should implement a long-range plan for its infrastructure needs, taking action to define any missing data and developing a comprehensive bridges and roads asset management plan.
 - The Ministry of Infrastructure’s Building Together: Guide for Municipal Asset Management Plans is a useful reference for the creation of an asset management plan, as are “Council Member’s Toolkit: A practical guide to evaluating municipal asset management – Questions for the Council table”; and “Council Member’s Toolkit: A practical guide to evaluating municipal asset management – Tips for evaluating asset management plans”, Ontario Municipal Knowledge Network, Association of Municipalities of Ontario (Toronto: February 12 &15, 2015).

2. Review and establish existing service levels / resource allocation; identify opportunities to rationalize service delivery (3 of 4)

- As the earlier analysis of staff scheduling and the use of overtime illustrated, heavy use of staff during the winter months, especially with a long-serving workforce with significant vacation entitlements, results in very limited crew-size during the summer months. Incurring overtime and then offsetting with time-off-in-lieu of paid overtime exacerbates the staffing shortage.
- The summer is typically when major maintenance on road surfaces and drainage takes place, to prolong the useful life of those road assets, bridges and major culverts. Without a vigorous and well-staffed program of preventative maintenance, repair and rehabilitation, roadways will deteriorate more rapidly and costly road and bridge rebuilding will burden taxpayers. Over time, an avoidably high cost of maintaining the existing road network will also slow the pace at which the Town can afford to expand the rural road network, including adding more paved and better-drained infrastructure.
- It is important to note that the 'level of service' adopted for use in both winter control activities and summer public works programs reflects a choice by the municipality. While there are minimum legal obligations associated with water management and some road patrol and road maintenance activities, and these are increasing over time. However, most public works and recreation service activities reflect a decision to offer a certain level of service.
- Council should ensure that its decisions on the quality, timeliness and amount of roads and streets services are clearly spelled-out; and, staff must be sure that it documents the cost, in staffing, materials and equipment, that a given level of service necessarily requires. The same is true for water services and recreation services.

2. Review and establish existing service levels / resource allocation; identify opportunities to rationalize service delivery (4 of 4)

- While few doubt the merit of developing good performance data and detailed service-levels, is this a luxury of larger municipalities? In practice, if the Town borrows from the pioneering work of other smaller municipalities, it should be possible to set performance standards for each of the key services provided by Erin, and to match the budgeted resources to the services, and to evaluate service delivery each year, or half the services every other year. (The challenge may be more the age of the Town's financial systems).
- For example, the popular tourist Town of Banff AB (population 9,000) has created an annual Municipal Service Review program. It is a 'continuous improvement' process that informs Council's annual budget debate and makes transparent the link between service requirements and their cost to the Town. In a readable report, several dozen municipal activities are described, service-levels established, and individually funded – all in a way that is clear to Council, residents and staff. The Town complements the service reviews by using these same service categories for its annual operating and capital budgeting.
 - Banff 2012 Service Review <https://www.banff.ca/DocumentCenter/View/1409>
 - Banff 2011 Service Review <https://www.banff.ca/DocumentCenter/View/650>

Recommendations

1. That the Town review its existing range and level of services, and matching them with staff and financial resources, with a view to meeting current priorities and ensuring that scarce resources are devoted to priority activities
2. That the Town explore opportunities to transfer roads capital works projects to the County, in exchange for taking on additional maintenance responsibilities in areas of County responsibility; and,
3. That the Town develop a comprehensive asset management plan for its transportation infrastructure needs.

3a. Improve customer service and the business climate - Greater efficiency and effectiveness in building, planning, water, and economic development (1 of 5)

Background and Consultations

- During interviews and Task Force meetings, Town Council members and staff raised concerns related to the affordability of Erin's tax and water rates for its residents. (However, the past decision to fund water on a "full lifecycle" basis needs to be recognized).
- Also cited as major concerns were the capital asset improvements required to maintain Erin's transportation and water infrastructure. A lack of urban services is certainly a constraint on growth. As a result, both staff and Council believe the Town may be facing financial challenges going forward.
- In addition, it was suggested that in the past, the Town has not taken a proactive, customer service-oriented approach to attracting new businesses and residential development. This may have resulted in turning away potential new business investment and residential growth, due to an external perception of an onerous, un-facilitated approvals process.
- Not surprisingly, given the foregoing factors, Erin has seen limited growth.
- During the course of our work, StrategyCorp was asked to prepare and presented an analysis of the land-use planning function. We were pleased to facilitate discussion of alternative methods to deliver planning services, including providing planning services from the County. The solution adopted by Town Council appears to succeed in providing more depth and responsiveness to Town clients, while delivering the service on a cost-competitive basis and without sacrificing environmental protection.
- Despite these gains, there will still be need for planning studies and service-improvements to meet the needs of a growing community, and to be welcoming to well-planned new development. But the foundation is now sound. There remains, however, a continuing need to link planning decisions with site plan approvals, good traffic planning, building inspection, water-service standards and installation, promotion of investment, protection of the environment (including administration of fill regulations), and ensuring that new properties are added expeditiously to the tax roll.

3a. Improve customer service and the business climate - Greater efficiency and effectiveness in building, planning, water, and economic development (2 of 5)

Analysis

- When analyzing Erin’s MPMP data, we found that the turnaround time for Erin’s buildings department in approving / not approving building applications was within the average of its peers for 2013, and below the provincial standard for residential, small and large commercial applications.
- The number of completed building permit applications is lower in Erin than among its peers in all categories. It is StrategyCorp’s view that the volume of applications relative to the staffing level suggests the potential for productivity improvements. This might include staff taking-on new or wider responsibilities, in such areas as property standards enforcement, enforcement of fill regulations, expediting resolution of outstanding non-compliance cases and commenting-agency input, and facilitating the preparation of ‘complete applications’ by applicants for various planning and building approvals and permits. Such additional activity would also enhance the Town’s customer service reputation among its clients and residents.

Percentage of Complete Building Permit Applications (by Category):	Town of Erin	Puslinch	Guelph / Eramosa	Center Wellington	Weighted Average	Erin vs. Average
Houses (not exceeding 3 storeys/600 square metres)	57%	90%	72%	96%	85%	67%
Small Buildings (not exceeding 3 storeys /600 square metres)	79%	100%	17%	88%	82%	97%
Large Buildings (large residential/commercial/industrial/institutional)	55%	100%	73%	92%	83%	65%

- As noted, StrategyCorp has already reviewed and provided advice on ways in which the Town’s planning function can be streamlined and made more ‘enabling’ for applicants with potentially worthwhile planning applications.

3a. Improve customer service and the business climate - Greater efficiency and effectiveness in building, planning, water, and economic development (3 of 5)

- Municipal efforts to promote economic development can be difficult to evaluate, since many investment and business decisions are made for reasons unrelated to municipal practices, regulations or tax rates. StrategyCorp encourages Council to continue to support recent efforts to promote local business and to facilitate the approvals process, consistent with Council policy and legislation. The work of Economic Development Coordinator Bob Cheetham appears to reflect 'best practice' for smaller municipalities.

Commentary

- Located within reasonable driving distance of downtown Toronto, Erin is very accessible to the Greater Toronto Area, providing a competitive advantage over some comparable lower-tier communities.
- Improved integrating of building, planning, water and economic development services, by providing a simplified and complete 'customer service experience' could provide benefits to the Town in the form of enhanced economic development activity.
- Of course, the decision to adopt a pro-growth philosophy is complex and beyond the scope of an Operational Review. But there are 'operational considerations':
 - Addressing the Town's strained capital infrastructure position will require increased revenues, which can only be meaningfully achieved through either: 1) raising property taxes and utility rates; or, 2) growth in taxable assessment and economic development.
 - In 2013, residents bore nearly 90% of the tax burden in Erin. Improving Erin's business climate through economic development would reduce the Town's dependency on residential property tax revenues, adding additional flexibility in the decision-making process.
- Going forward, if the Town wants to grow, economic development will need to be a Council-driven priority. The recently re-activated Erin Economic Development Committee is an important first step in giving economic development priority.

3a. Improve customer service and the business climate - Greater efficiency and effectiveness in building, planning, water, and economic development (4 of 5)

Planning Functions

For the past two years, Town Council has heard public suggestions that it review the options available for delivering municipal planning services. During its consultations with Council members and staff at the end of last year, the effectiveness of the then-current arrangements were raised with StrategyCorp on a number of occasions.

When the original decision was made by the Town to create an in-house planning position, it was anticipated that the volume of development would be greater than it has been. In addition, at that time, substantial direct local control over the planning process was a Council objective.

As part of 2015's budget process, StrategyCorp was asked to produce a supplemental independent review of the various planning servicing options, to be financed from adjustments to the 'fixed price' contract budget for the Operational Review. (As a result, StrategyCorp did not undertake a review of Fire Department operational issues, although it indicated that it might be prepared to do so at a later date as a separate contract).

As part of the StrategyCorp review of all land-use planning functions, each department was asked to provide an overview of the work that they currently perform in this area. Upon analysis, it was concluded that by streamlining operations and recognizing existing enforcement capability, the process would be improved if the Building Department assumed: the responsibilities of site plan review and agreements; minor variance applications; site alteration permits and complaints; development and subdivision agreements; and, administrative tasks.

This reallocation of work has been complemented by contracting the Town's planning functions to the County, while ensuring local presence and input. The preliminary results from these changes appear very beneficial to the Town and its planning process clients, including cost savings, increased efficiency and effectiveness of service-delivery, and ultimately improving customer service.

3a. Improve customer service and the business climate - Greater efficiency and effectiveness in building, planning, water, and economic development (4 of 4)

Recommendations

1. That the Town build upon recent efforts to prioritize economic development and growth in the Town, focusing on commercial activity to increase the property tax assessment base through more streamlined, integrated and customer-service-oriented application processing by economic development, building, planning and water departments;
2. That the Town introduce economic development benchmarking and best practices, aligned with the Town's strategic priorities, to facilitate measuring the Town's success with its economic development initiatives going forward; and,
3. That the CAO, in collaboration with the affected staff, redesign the position descriptions and work program for the staff in the Building Department, to expand responsibilities in such areas as property standards enforcement, enforcement of fill regulations, expediting the resolution of outstanding non-compliance cases and commenting-agency input, and facilitating the preparation of 'complete applications' by applicants for various planning and building approvals and permits. (See following section 3b and comments under "Planning Functions" in 3a, on the previous page/slide)

3b. Improve customer service and the business climate - Review processes for fill permits, property standards enforcement, etc. (1 of 3)

Background and Consultations

- During SCOPE Task Force meetings, concerns surrounding the site alteration and fill permit processes were raised.
- Staff pointed to the processes being too costly and onerous for taxpayers. The process is believed to discourage filing for fill permits, oftentimes resulting in illegal fills as a result. These are considered damaging, as illegal fills can adversely affect the environment (damage wildlife habitat and natural drainage), and make it difficult to sell or secure financing on land with concerns over soil contamination.
- The business of transporting fill has other consequences, including damage to roadways by large trucks, which unlike aggregate industry trucks, provide no cost recovery to the Town. This problem has been exacerbated through insufficient enforcement at the Town. Staff suggested increased enforcement, and the use of bonding or including an allowance for road damage in the fee for fill permits.
- The SCOPE Task Force also expressed concern about tax collection for new building developments. In some instances, owners occupy new homes or other buildings before proper building permit approvals and conditions have been met. As a result, the Town is unable to collect taxes on these properties in a timely manner, or not at all, since Municipal Property Assessment Corporation (MPAC) evidently uses legal occupancy as a trigger for adding properties and businesses to the assessment roll.
- Staff reported that MPAC is often slow to respond to requests from the Town to inspect these inhabited incomplete dwellings, often taking one-and-a-half to two years to investigate. In addition, taxes payable following an MPAC assessment are not always backdated to the original move-in date, resulting in permanent lost revenues for the Town.
- This building occupancy loophole risks being used by those not choosing to finalize construction or meet all conditions for a new building until they have sold the property, with the aim of avoiding the higher property tax obligations.

3b. Improve customer service and the business climate - Review processes for fill permits, property standards enforcement, etc. (2 of 3)

Analysis

- Erin's Buildings department is comprised of a Chief Building Official, a Building Inspector/Municipal By-Law and Property Standards Officer, and partial hours of an administrative assistant.
- For a municipality with a population of more than 10,000, it would appear as though there could be additional capacity for Erin's buildings department, as the department undertook a total of 118 complete applications and 81 incomplete applications in 2013. Some of the additional capacity in the building inspection function may now be devoted to supplementing the planning function, since the introduction of the County planning service during the course of the StrategyCorp Operational Review.
- Following some preliminary analysis, it appears that that building-occupancy tax-avoidance practices could be costing the Town tens of thousands of dollars each year in un-assessed potential tax revenues. Even with retroactive recovery following eventual MPAC addition to the roll, delays may result in only partial collection of arrears. As the Town seeks to enhance development activity in the future, this problem could become larger.

Commentary

- Reducing delinquency on fill permits through enhanced enforcement would greatly improve the Town's control over the issue of illegal fills. In consultation with the Town Solicitor, it would be wise to consider the full "all-in" cost of fill permits, including any cost to transportation infrastructure, either through bonding or an additional fee to offset roads damage.
- Additionally, the need for improved enforcement on evasive activities related to official building occupancy could yield significant financial benefits to the Town and is an area for further exploration. To this end, Council may wish to direct the Mayor to take this matter up with the Assessment Commissioner, either on his own, or in concert with other similarly affected municipalities.

3b. Improve customer service and the business climate - Review processes for fill permits, property standards enforcement, etc. (3 of 3)

- While more enforcement would require more staff time, consultations revealed that the buildings department could benefit from increased automation of the buildings application process. For example, through providing an online portal for building permit applications, one which requires the completion of all mandatory fields before an application could be submitted, the buildings department could save a great deal of time in following-up with applicants related to missing application information. Provision of a simple and clear paper-based checklist for buildings applications could also help to this end.

Recommendations

1. That the Town enhance enforcement for illegal fills, and include protection from roads damage as part of fill permits, either through requiring bonding or the introduction of additional fees to offset the cost to repair roadways resulting from fills; and,
2. That the Town ensure that MPAC adds taxable properties to the tax roll on a more timely basis, supported by through cooperation among the Town's building, finance and water departments in monitoring and reporting of illegally occupied properties. Council may wish to consider taking this matter up directly with the Assessment Commissioner.

3c. Improve customer service and the business climate - Incorporating better system-standards for municipal services to new properties (1 of 2)

Background and Consultations

- During Task Force interviews, concerns were raised related to approvals for water servicing in new developments.
- Under current Town processes, water servicing is put into place before site plan approval, without cross-departmental communications or verifications.
- As a result, watermain stops are often located in places that are later approved for driveway construction, resulting in stops being covered by driveways.
 - This was considered detrimental to the integrity of water lines, as water stops located under driveways are more prone to freezing, and moving water lines to avoid a driveway results in bending of water lines, which can damage the integrity of the piping, resulting in additional maintenance and servicing requirements.
 - The water department is then forced to service such damaged lines from its budget, resulting in increased water rates for residents.
 - Advance water hook-ups also increase the likelihood that properties will be occupied before all compliance conditions are met and before they can be added to the assessment roll.

3c. Improve customer service and the business climate - Incorporating better system-standards for municipal services to new properties (2 of 2)

Analysis

- The Region of Peel's Public Works Design, Specifications & Procedures Manual outlines that all water service connection locations shall have a minimum of 1.2 meter horizontal clearance from all other utilities or structures (including driveways) for water service lines 50mm and smaller.
- Similarly, Guelph/Eramosa Township provides the following guidance to residents on its water services website:
- "...Should the curb stop be located within your driveway, we strongly encourage property owners to ensure at the contractors confirm with the Water/Wastewater Department that these curb stops are functioning properly prior to paving and that it remains accessible upon the completion of the driveway. Should the curb stop be buried, any repairs to your driveway will be at the property owner's expense."

Commentary

- If the Town were to implement policy to include the servicing of water lines during the site plan approval process, it would ensure cross-departmental communications between the building, roads and water departments related to site plans and water servicing, and would help avoid driveways being built on top of water line curb stops where possible.

Recommendation

1. That the Town adopt the policy to include the installation of water lines, where applicable, during the site plan approval process and/or severance process, in consultation with the buildings, water and roads departments.

3d. Improve customer service and the business climate - Redesign of 'front office' / customer-facing services and associated staff duties (1 of 2)

Background and Consultations

- Staff suggested that some customer service improvements might be achieved with 'flow' in the Town office building, noting that the 'front office' functions are unclear to the public and disruptive to the work of the staff. In addition, there is a great deal of unused space in the office, and a lack of cohesion in dealing with customers who visit in-person. There has been some budget provision made to address this in 2015.
- In addition, a lack of access to private space for many staff has resulted in issues of sensitive discussion topics being held with customers in open areas, or in-house matters being discussed in the presence of unaffected members of the public.
- Part of the challenge relates to the overlap of roles, and the absence of one designated "front-line" person to act as the primary 'customer service representative' for the Town. Following the practice of other municipalities, this staff position could respond to a range of routine customer service and business information inquiries, while directing residents and Town clients to the appropriate departmental staff for more detailed attention to their business or information needs.

Commentary

- Redesigning customer facing services and associated staff duties will help to provide a higher level of customer service and a sense of welcome for taxpayers. The Town's current front-office arrangement with separate administrative and financial customer services results in confusion for customers and duplicative efforts for staff.
- A more orderly work environment will also improve staff productivity and help to ensure that members of the public receive prompt, informative and courteous response from the appropriate staff, including the opportunity to discuss some issues in a more confidential setting. Improving signage at the Town office would also help in this regard, including improved signage to assist clients in locating the Town office. It should be noted, however, that the office layout should follow the realignment of front-office duties, so the office layout will align with new customer service duty divisions.

3d. Improve customer service and the business climate - Redesign of 'front office' / customer-facing services and associated staff duties (2 of 2)

- In making any front-office changes, accessibility must be considered to ensure the Town is compliant with regulatory requirements.
- The Town should also consider options, such as the creation and use of designated private space(s) so that sensitive matters with taxpayers can be handled confidentially.

Recommendations

1. That the Town improve its front office design based on the recently improved designs at neighbouring jurisdictions;
2. That any redesign of the Town office include the opportunity for residents and taxpayers to discuss some issues in a more confidential setting.; and,
3. That the Town streamline customer-facing services, with a customer-centric focus, including improve signage and 'way finding' in the office and from the roadway, for both the Town office and Roads Department clients.

3e. Improve customer service and the business climate - Creation of an 'advocate' or 'champion' to advocate and expedite worthwhile economic investments

Background and Consultations

- As noted above, welcoming new investment and promoting economic development is important to both the economic and fiscal future of Erin and its constituent communities. It would appear that economic development is a competitive challenge and priority for all Wellington County municipalities, as the County and virtually all local municipalities have economic development staff.
- One of the challenges faced by any municipality in promoting growth is that the municipality's primary responsibilities for regulation, planning and fiscal sustainability can place perceived hurdles in the way of those wishing to expand employment and economic activity or to develop new or expanded commercial, agricultural or residential properties.
- Responding positively and rapidly to good development proposals and to overcome these perceived barriers to good proposals is especially important when major economic development opportunities present themselves.

Analysis

- In the course of StrategyCorp's work, it has been suggested that Erin may have developed a reputation of being a difficult locale within which to do business, although that reputation is beginning to change.
- However, it is equally important that professional staff do their jobs properly, and ensure that Council's policies are met, regulations respected and provincial legislation observed. There are also professional standards and practices that should not be ignored in the quest for new investment or more employment.
- The Town has achieved a number of successes with its efforts to improve Erin's reputation as a good place to do business and in creating an environment that encourages more investment and development. Much of the credit for these initiatives lies with the contract economic development officer. However, as that is a time-limited appointment, Town Council will be giving consideration to future arrangements.

Commentary

- It can be difficult – and in some cases inappropriate – for individual staff members to undertake the combined roles of regulator and facilitator on development applications. The most practical way to balance this internal tension within any municipality, is not to ask professional staff to “wear two hats”, as both regulator and advocate on behalf of applications with perceived merit..

3e. Improve customer service and the business climate - Creation of an 'advocate' or 'champion' to advocate and expedite worthwhile economic investments

Economic Development

Recommendations

1. That the Town find a practical, cost-effective way to supplement the County's economic development program, including staffing arrangements and in-house procedural improvements that will give more profile to applications with potential economic development merit, including an office designed to ensure and maintain optimum confidentiality when dealing with clients and members of Council;
2. Based on Council's priority for growth in commercial and industrial assessment and its focus on "best practice" customer service, consideration should be given to creating a 'stand alone' economic development function, reporting directly to the CAO/Town Manager, in order to give it the profile and independence such a role needs to play with business prospects;
3. The economic development function should be staffed on a permanent basis by an experienced economic development officer (EDO), supported by an administrative assistant employed at least half-time;
4. That the EDO be supported with advice from an Economic Development Advisory Committee, appointed and mandated by Council, and reporting to the CAO/Town Manager;
5. That the economic development function be measured annually on a well-defined set of metrics that assess inputs and outcomes, to ensure optimum efficiency and appropriate operating budget allocation; and,
6. That the economic development officer work closely with the County of Wellington economic development department to maximize regional collaboration and opportunities for project leverage

4. Initiate a program of staff development, performance evaluation, succession planning, and continuous improvement (1 of 5)

Background and Consultations

- During Task Force meetings, staff expressed concern at the lack of a systematic performance review process at the Town. While some individual departments are currently undertaking performance reviews, other departments aren't having consistent reviews with goal setting and identification of areas of improvement.
- Some staff also expressed concern related to a lack of recognition for providing services above-and-beyond typical daily tasks.
- In addition, interviews and Task Force meetings revealed that Erin does not participate in benchmarking with other municipalities as an ongoing standard practice.

Analysis

- Small municipalities are busy places, and discretionary items like goal-setting and performance review can be overtaken by day-to-day issues. But without strategic management and evaluation of goal achievement, neither the Council nor the CAO can effectively oversee the management of the organization. It is important to have strategic goals and clear business objectives, and to communicate them clearly. That means annual business plans for departments, with milestones. It also means translating these goals into targets to be met by management and staff, through a performance evaluation system.
- A municipal performance evaluation system should set goals on a mutually understood and agreed basis, monitor performance against those goals, and evaluate performance at the end of the annual cycle – and then repeat the process. To be successful, performance evaluations should be easy to complete, incorporate targets that reflect Council and management goals, be clear to the staff affected, be reviewed by 'the supervisor's supervisor', be done annually and reviewed semi-annually, and have consequences.
- The performance review process should begin with an annual goal-setting and review process for the CAO, led by the Mayor and members of Council.
- The Town of Erin has a performance evaluation system, but it is not consistently applied, the goals are not aligned with the Strategic Plan and other corporate priorities. In many cases, the necessary staff interview meetings are not held in a timely fashion and the associated documents are not completed.

4. Initiate a program of staff development, performance evaluation, succession planning, and continuous improvement (2 of 5)

Commentary

- Implementation of a standardized performance review process that is easily administered and aligned with the Town's strategic priorities could provide a multitude of benefits for the Town. Regular performance reviews provide staff with clarity on expectations, facilitate open dialogue, and can improve employee's sense of purpose and overall productivity.
- In structuring such a process, performance reviews could consist of annual meetings between employees and their direct supervisor to ensure employees are progressing towards agreed-upon goals, coupled with a simple performance appraisal form. The performance appraisal form should :
 - Identify annual performance targets that align with Council's goals and departmental business and budget plans;
 - Allow for review by "the supervisor's supervisor", as a confidence-building feature for employees;
 - Be simple and straightforward, to focus on key objectives and to ensure timely completion of appraisals by supervisors;
 - Encourage managers and supervisors to be forthright in identifying real or potential employee performance issues, as well as opportunities for performance improvement and professional growth; and
 - Encourage supervisors to explore future career plans of those for whom they conduct performance reviews.
- As the adage goes, "what you can't measure, you can't manage". The Town should embrace performance measurement and performance monitoring as a way to manage its human, material and financial assets, as well as to demonstrate performance to Council and the residents and businesses of the Town.
- There are several well respected performance measurement systems in use by lower-tier governments across Ontario, and the Town of Erin should participate in those surveys. It should be possible to improve year-over-year comparisons of Town performance, both internally, and with comparable municipalities. As noted elsewhere, the Town of Banff in Alberta uses Ontario's own Ontario Municipal Benchmarking Initiative (OMBI). There are other, similar programs by professional discipline (e.g., 'Good Roads' (OGRA), finance, etc.).

4. Initiate a program of staff development, performance evaluation, succession planning, and continuous improvement (3 of 5)

- The Town should also consider expanding the scope of employee recognition. This would help improve employee satisfaction, which can have a strong impact on performance and productivity. Staff recognition does not need to be burdensome or expensive to administer. Of particular benefit are programs where innovation or creative cost-saving ideas are proposed and implemented. These programs have been very successful in private industry, but they can be just as useful in government.
- Some progressive municipalities reward innovations that result in taxpayer savings, whether by reducing costs or avoiding future costs. The typical program model is based on the “suggestion box” format, where ideas are referred for an evaluation by the Town staff in the best position to verify the associated claims. If verified and implemented, those making the proposal receive an award or prize.
 - “Innovation awards” programs must be designed so that the savings are “real”, however, not just a recommendation to purchase some readily available and widely used labour-saving technology or to reduce the size of a work unit. It is also preferable that the program exclude eligibility of senior management and the manager of the affected program area, as innovation is a basic job expectation for these employees.
- As part of staff recognition, the Town should also celebrate individual staff, departmental or organizational achievements to a wider audience, to enhance the reputation of the Town government and its employees and officials. This would provide additional recognition for staff at no cost to the Town.
- Given the Town’s small organizational size and the degree to which individual contributions impact the wellbeing of the Town as an organization, the Town should develop a basic corporate “succession plan” to ensure the loss of any single employee would not severely disrupt services at the Town. The succession plan will require personal involvement of senior leaders, and should identify:
 - Staff members with a potential to be promoted to new or more senior responsibilities;

4. Initiate a program of staff development, performance evaluation, succession planning, and continuous improvement (4 of 5)

- “Gaps” in the managerial or professional ranks that would need to be filled by external recruiting or training and developing existing staff, with education or work-experiences. This includes both identifying current competency requirements but also determining anticipated “gaps” in the organization based off the strategic direction the organization is undertaking;
 - Opportunities to phase-in / phase-out senior staff positions, including taking the time to ensure “knowledge transfer” from retiring or departing senior staff; and
 - An assessment of key position descriptions and the competitiveness of compensation for those duties, in order to recruit and retain capable staff.
- Performance reviews could help inform the succession planning process, and could be used as a tool to track employee progression towards succession plan goals. The Ontario Hospital Association has released an excellent Succession Planning Resource Guide that may be of use in undertaking this process.
 - It should be noted that succession planning is an ongoing and long-term process that does not exist in isolation. It must be intertwined with the Town’s strategic and organizational objectives in order to reflect the Town’s desired leadership goals.
 - Succession planning should include confidential conversations with those who are nearing retirement, about ways in which the Town and the employee can work together to ensure a smooth transition, including such things as bridging to early retirement, developing a successor, or beginning a recruiting program early. The OMERS pension plan makes it possible for many municipal employees to retire with dignity and a degree of financial security. This ‘fact of municipal life’ should inform succession planning discussions.

4. Initiate a program of staff development, performance evaluation, succession planning, and continuous improvement (5 of 5)

Recommendations

1. That the Town develop and conscientiously implement a standardized performance review process across the entire organization;
2. The performance review process should begin with a confidential, annual goal-setting and review process for the CAO, led by the Mayor and members of Council, and including a joint evaluation of senior staff performance;
3. That the Town enhance employee recognition efforts: to reward new, productivity-enhancing ideas, to acknowledge exceptional staff performance, and to motivate employee achievement;
4. That the Town undertake succession planning to ensure the organization is positioned for long-term success; and,
5. That the Town increase participation in performance measurement surveys to develop performance measurement benchmarks upon which to compare itself to similar lower-tier municipalities and develop processes to measure and foster continuous improvement.

5a. Integrate and streamline the Recreation functions in the Town – Management and Operations (1 of 3)

Background and Consultations

- During the Task Force meetings and interviews with senior staff and Council, there was a proposal to combine the management of the two arenas as one department, to emphasize enhanced internal collaboration.
- It was also pointed out that the recreations department spends a great deal of time maintaining the Town’s baseball diamonds and soccer fields, providing a level of service that is beyond the cost charged for rental of the fields.

Analysis

- Interestingly, when compared to its peers, Erin is reported to provides nearly four times the amount of outdoor recreation facility space per capita than average, although this may be a Ministry reporting error. However, Erin does provide nearly 50% more indoor recreation facility space to its taxpayer base per capita than its peers. This is a possible area where Erin could be over-serving its population.
- Erin did not report providing any participant hours for its recreations programs in 2013. In part, this may reflect the fact that Erin staff provide many recreational and grounds-keeping services that fall to non-profit user-groups in other municipalities.

Recreational Participation and Capacity 2013 MPMP Data	Puslinch	Guelph / Eramosa	Centre Wellington	Town of Erin	Average	Erin vs. Average
Participant Hours for Recreation Programs: Total participant hours for recreation programs per 1,000 persons	969.8	5698.7	23851.8	0	7630.1	0%
Indoor Recreation Facilities: Square metres of indoor recreation facilities per 1,000 persons (municipally owned)	145.0	379.6	545.0	646.8	429.1	151%
Outdoor Recreation Facility Space: Square metres of outdoor recreation facility space per 1,000 persons (municipally owned)	377.3	127.3	43.8	14053.0	3650.3	385%

5a. Integrate and streamline the Recreation functions in the Town – Management and Operations (2 of 3)

Commentary

- The Town’s existing recreations management structure, where each of the arenas is operated by separately, is a pre-amalgamation arrangement that has likely outlived its usefulness. Consolidation of the two arenas and all recreation and leisure activities into one ‘recreation department’ would provide operational efficiencies, and would enable streamlined operations through a more unified approach to recreational services and user-groups.
- In this light, recreational services should look to ways to streamline processes when providing services to residents. Existing maintenance processes and standards at Erin’s soccer fields and baseball diamonds appear to be an inefficient use of recreation staff time. A more simplified process and greater reliance on user groups to prepare for and manage their own events would reduce time-demands on staff. By shifting staff resources to other, higher priority activities, staff productivity would improve and demands for increased staffing would be easier to contain. An example of the success in simplifying services is the recent transition from use of snack bars to vending machines at the arenas, which solved issues with misplaced financial receipts, providing an easily accounted for source of revenue for the Town.
- When considering methods of streamlining maintenance processes, the City of Guelph provides useful guidelines for outdoor season facility rentals maintenance on its recreation department website. It incorporates streamlined maintenance processes to reduce staff efforts, including: less-frequent field maintenance schedules; clear fees and self-serve procedures for residents using ‘lighted’ facilities, including lockbox and key; and, the use of storage boxes for some maintenance equipment such as liners to encourage resident participation in maintenance activities.
 - Similarly, the Town of Richmond Hill’s Outdoor Facility Booking Procedures provides service and maintenance standards and procedures that could assist the recreations department in this regard.

5a. Integrate and streamline the Recreation functions in the Town – Management and Operations (3 of 3)

- As in all other areas of contemporary service delivery, the more that the customer assumes responsibility for determining the level, quality and specifics of their service needs, the less need there is for someone to provide those services. For example, when an adult athletic group assumes responsibility for preparing its own baseball diamonds and provides its own bases, they have control over the quality and timing of the services they want, and the taxpayer is not responsible for providing those services.

Recommendations

1. That the Town combine management of the two arenas into one recreations department to streamline management and offer more efficient service; and
2. That the Town simplify and reduce the premium maintenance standards of its outdoor recreations facilities, following other municipal best practices, so that staff can be redeployed to higher value-add service delivery areas.

These recommendations complement the earlier recommendation in this Study, dealing with ‘outside’ maintenance activities:

- That the Town combine maintenance activities of Roads, Water and Parks into one Town ‘Operations’ Department, with the name to be determined by the Council on recommendation from the CAO

5b. Integrate and streamline the Recreation functions in the Town – Revenue Collection and Tracking (1 of 2)

Background and Consultations

- It was noted during interviews and Task Force meetings that the arenas currently provide discounted rates up-front for use of recreational facilities to special groups, and that such discounted rates could be reducing departmental significantly.
- During the Task Force meetings, staff also pointed to substantial accounts receivables from Centre 2000. Staff believed the arena's practice of not requiring payment upon booking was cause for the significant accounts receivables, and suggested requiring payments upon booking for both arenas, including the charging of administration fees for cancellations.

Analysis

- StrategyCorp reviewed permit applications, fee payment terms, and general terms and conditions for facility rental at several other municipalities. The review included the practices of the City of Guelph, Guelph/Eramosa, Orangeville, Puslinch, Centre Wellington, East Garafraxa, and even explored whether very large municipalities, such as the City of Toronto, had developed efficient systems to serve a range of clients and customers.

Commentary

- In relation to grants, the Town should consider adopting a grants policy for the provision of discounted rates for recreational facility use. The policy should be one where all user groups are charged the same full rate up-front, but with partial refunding of booking costs upon completion and approval of a grants application by Council.
 - This “truth in accounting” approach allows Council to show (and often charge) the full, all-in cost of a service, so that users have a clear idea of the cost of those services and the impact of any taxpayer subsidy. It frames more appropriately the context for applying for and granting subsidies from the taxpayer. It also motivates voluntary organizations to assume some of the expense or time associated with providing the service, as a condition of public subsidy.
 - In so doing, the Town would be able to monitor the impact of providing discounted rates to special groups, and could adjust its policy or requirements as needed to control the financial impact to the Town from providing discounted rates.
 - This policy would also place the burden of proof on special groups applying for discounted rates, and is standard practice in several other municipalities.

5b. Integrate and streamline the Recreation functions in the Town – Revenue Collection and Tracking (2 of 2)

- Through its analysis, StrategyCorp would like to point to the following standard practices in other municipalities, for booking, revenue collection, and tracking processes:
 - Booking: Booking is often made through a centralized booking system shared by the entire recreation department, which sometimes include payment capabilities as part of the booking process. Full details on booking policy, requirements, maintenance, etc. is generally easily accessible online and clearly stated so that the policy is understood. The City of Guelph’s website could serve as a useful template in this regard.
 - Payment Terms: Requiring payment in full at least fifteen (15) calendar days prior to the start date for tournaments and special events, with a 25% non-refundable deposit upon booking was standard. Individual facility rentals generally required full payment upon booking. Payments are accepted in cash, debit or credit card.
 - Cancellation Policy: At least fifteen (15) calendar days advance notice of cancellations in writing was standard in order for residents to receive full credit onto their account. Groups providing less than fifteen (15) days are generally required to pay the full rate of the booking. Subsidized contracted users (e.g., Minor Youth groups) may be invoiced for the full (unsubsidized) rate for any unused time that has not been cancelled. An administration fee can be applied to any cancellations that abide by the fifteen days advance notice.
 - Rescheduling Policy: Rescheduling is permitted without penalty with a minimum of fifteen (15) business days notice. The rescheduled date is often ineligible for refund if cancelled, regardless of the amount of advance notice given. Rescheduling with less than fifteen (15) business days notice is considered cancellation and is charged at the full rate by most municipalities reviewed.

Recommendations

1. That the Town adopt a policy requiring user groups to pay full rates up-front and to apply for reduced rental rate grants through Council; and,
2. That the Town implement a stricter booking, payment, cancellation and rescheduling policy for rental of its recreational facilities, with clearly defined conditions made publicly available on its website.

5c: Integrate and streamline the Recreation functions in the Town – Consider integration of town recreation facilities when existing facilities reach the end of their useful lives or require major refurbishing (1 of 2)

Background and Consultations

- During interviews and consultations, concerns surrounding the condition of the Hillsburgh arena, a lack of parking at the Hillsburgh Arena, and ongoing operational, capital and revenue issues surrounding the existing Centre 2000 arrangement with the local school board were raised.

Analysis

- Currently Centre 2000 has sufficient space to build a second ice pad, although the physical plant would require upgrading. Should the Hillsburgh arena become too costly to maintain in the future, the Town has the option to build a second ice pad at Centre 2000 to ensure it is providing the same level of service to its taxpayers. Selling the Hillsburgh arena could help to offset the cost of constructing an expanded arena / community centre.

Commentary

- Interviews revealed that the Hillsburgh and Erin arenas form an important part of their respective communities. Hillsburgh's arena, in particular, is at the centre of its commercial core and forms an important part of the local community. Only if some future facility were clearly superior in its ability to meet residents' needs would consolidating arena facilities likely be supported.
- It should be noted, however, that parking and traffic safety are issues at the Hillsburgh arena, especially on busy days when local retailers must compete with arena patrons for parking. Of course, the fact that arena patrons arrive by car suggests that the arena's location may now be less of an issue than in years past.

5c: Integrate and streamline the Recreation functions in the Town – Consider integration of town recreation facilities when existing facilities reach the end of their useful lives or require major refurbishing (2 of 2)

- If the Hillsburgh community becomes less dependent on the local arena as a community hub, arena consolidation may make sense, from perspectives of facility quality and amenities, and tournament hosting, as well as fiscal and economic development impacts.
- To this end, the Town should consider developing a “recreation master plan”. It should address the long-term recreation needs of the Town and the capacity for its current facilities to provide for those needs. The plan would clarify the future capital requirements for the Town’s recreational facilities, notably the arenas, and provide guidance for taking the best approach to recreations planning, including capital budgeting for future expenditures.

Recommendation

1. That the Town create “recreation master plan” to consider options for integrating major community recreation facilities when existing facilities reach the end of their useful lives, or require major refurbishing.

6. Consolidate facilities management, asset management and fleet management responsibilities (1 of 2)

Background and Consultations

- During interviews and Task Force meetings, concerns were raised about the condition of the Town's capital asset inventory, and the capacity of the Town to finance needed capital maintenance and upgrades. Staff also suggested that increased capacity and/or sharing of equipment and vehicles could be an area where Erin could reduce costs for external contracting and deliver services more cost-effectively.

Analysis

- Based on the Town's 2013 Asset Management Plan, conducted by Watson & Associates, the Town owns and manages tax supported capital assets with a 2013 replacement value of \$177.6 million, excluding land, land improvements, vehicles, equipment and machinery. The Town's water assets in 2013 amounted to a replacement value of \$32 million. Any gains in efficiency through maintenance and repair both protect the life-span of the assets, and defer the day when capital expenditures are required to replace or repair them.
- Based on the Town's 2015-2019 Capital Plan, discussed at the January 27, 2015 council meeting, the Town has a funding gap of \$22 million in total for capital projects over the next five years.

Commentary

- Streamlining of facilities management processes across the Town organization could help in implementing the Capital Plan to reduce the backlog of deferred maintenance and extend the life of the Town's assets.
 - This should only be undertaken after a review by the CAO, to ensure that any consolidation of existing work units maintains or enhances their current efficiency and cost-effectiveness, while sharing their expertise and capacity across the whole organization.

6. Consolidate facilities management, asset management and fleet management responsibilities (2 of 2)

- The Town should also consider ways to leverage “intangible” assets: There is a tendency to think of assets as bricks-and-mortar or financial assets, but increasingly “intangible” assets are recognized as creating significant value for public organizations. The experience of the water department in leveraging tablet technology to facilitate site ‘locates’ demonstrates the ability of information technology to enhance performance and efficiency in the delivery of services.
- In addition, the Town should continuously explore opportunities for energy efficiency: Facilities maintenance programs can reduce energy and other utility costs. Hillsburgh arena, for example, was pointed to as a facility that could benefit from implementation of initiatives to improve energy efficiency.

Recommendations

1. That the Town streamline processes for routine and major maintenance of all Town facilities, including sharing of information and collaborative procurement efforts;
2. That the Town develop and implement upon a comprehensive basis, a facilities maintenance strategy to extend the life of capital assets; and,
3. That the Town, perhaps through the Treasury function, record and identify the potential for maintaining and leveraging ‘intangible’ assets, such advertising opportunities, as well as processes and databases facilitated by information technology.

7a: Improve administrative operations - Improved financial management systems (1 of 3)

Background and Consultations

- Throughout consultations with staff, management and Council, StrategyCorp found that the finance department in Erin had difficulty in performing all of their required duties, given limited staff availability and the limitations in existing financial information systems.
- Concern was also raised with financial reports, which are often done manually and require additional time-commitment from staff who are already heavily committed to other duties. As a result, departments reported being often unable to receive reports in a timely manner. In our experience, this leads to department-level duplication of project and program record-keeping.
- StrategyCorp interviewed the Treasurer, the Town's Auditor, and staff that create or make use of financial information, in forming its conclusions. StrategyCorp also drew on its experience with other municipalities, as Erin's situation is neither unique nor as problematic as others.

Analysis

- The Town's financial information systems have 'grown up' with the amalgamated treasury function, as have those running these systems. The systems and procedures are adequate for basic internal control, line-by-line budgeting, and financial reporting. But they are not contemporary: they do not benefit from labour-reducing new technology; they are limited in the kinds of reports they can offer management and Council, without considerable effort; they make project management and effective purchasing and procurement difficult. The procurement function, for example, gives the appearance of control (e.g., prior approval of payment vouchers) but it does little tie budgets to procurement, or enable multi-year operating or capital financial planning. At this level, Council members should not be asked to vet purchase vouchers.

7a: Improve administrative operations - Improved financial management systems (2 of 3)

- Despite the full cooperation and support of Erin staff, StrategyCorp found it was challenging to secure the kind of information necessary to do detailed analysis and inter-municipal comparisons. The fault seemed to fall with the increasingly obsolescent way in which information is recorded and records are kept, particularly in the area of municipal finance and municipal operations. There is also very little attention given to inter-municipal comparisons, or participating in annual surveys of key municipal indicators, with the exception of the mandatory, high-level MPMP program (Municipal Performance Management Program).

Commentary

- In their ground breaking book on Reinventing Government, Gaebler and Osborne repeated the old adage: “What you can’t count, you can’t measure – and what you can’t measure, you can’t manage”.
- Erin’s financial management systems and practices were sufficient for times past. Even now, they are adequate for financial controls and financial reporting, and produce the information needed to secure a good Audit report each year.
- But those who depend on good financial information to make future-oriented decisions – whether they are Council members or program managers within the municipality – cannot rely on the Town’s financial systems to be of much timely assistance.
- The Town’s financial systems facilitate reporting for audit and Ministry purposes, and they afford a good historical summary. But to do any specialized reports or to manage program expenditures in a timely fashion, managers must extract data and do manual analysis themselves, on paper or Excel spreadsheets. Even well established municipal systems governing things like public works equipment, use and attribution of capital for equipment reserves are not employed. The same could be said for asset management and facility management practices.
- Current accounting practices have evolved with the growth of the Town and the amalgamation a decade-and-half ago, but they are based on old systems and inherited practices. Much has changed in information technology and municipal accounting systems since 1998, but the Town’s financial systems and practices have not kept pace..

7a: Improve administrative operations - Improved financial management systems (3 of 3)

- To achieve some of the productivity improvements and service-delivery gains identified in this Study, it would be necessary to keep track of interdepartmental sharing of staff and equipment. It would mean judging programs by their success in meeting levels of service and performance goals set by Council. It would require monitoring of overtime and procurement, to ensure efficiency and compliance, without the need for duplication of effort and maintenance of manual or 'bootleg' systems to supplement the town's financial system. All of these activities would be difficult to do and time-consuming with the current systems.
- The Town should move away from a bookkeeping approach to financial management. Procedures such as prior approval of already budgeted capital and operating expenditures serve little purpose. They should give way to setting and monitoring budgets with specific performance objectives, for both operating programs and capital projects, with the aim of staying on time and on budget and promoting timely, competitive procurement and purchasing.

Recommendation

1. That the Town move away from a bookkeeping approach to financial management, and acquire a financial management system that can provide additional budget setting, planning and monitoring capacity, including the creation and monitoring of performance objectives.

7b. Improve administrative operations - Records management

Background and Consultations

- Records Management and By-laws were raised as areas of concern for staff and management at the Town, as the existing records storage room is currently overfilled and disorganized, to the point that it presents a health and safety risk to employees seeking to access files.
- It was suggested that the hiring of a summer student could help in improving records management and organizing the records management storage room.

Commentary

- Records are critical to any well functioning government organization. However, they do not need to be retained forever, and at the end of their operational life, they should be either destroyed or retained consistent with legislative requirements. In particular, by-laws and regulations should be contemporary and consistent.
- Responsible management of records enables the proper maintenance of institutional memory, maintains evidence of the Town's activities and that such activities comply with legal requirements, and ensures that appropriate information is available to decision-makers when needed. It is especially important in areas like public works, for as-built drawings and property lines have long lives.

Recommendations

1. That the Town identify options for an organizational system for records management, in line with municipal best practices;
2. That the Town explore the development of a Municipal Code, to bring together and modernize its 'non-planning' legislation and regulations in a single, easily consulted and easily amended location; and,
3. That the Town address and remedy the health and safety risk from the current records management storage system.

7c. Improve administrative operations - Management systems and communications (1 of 2)

Background and Consultations

- With the election of the current Council, many staff members commented that it also represented for them an opportunity for a new start, and that it was already reflecting itself in a noticeable effort by staff to improve customer service.
- However, a related issue has been the tendency to operate within 'silos' and for communications with staff, and even among managers, to be episodic or delayed.
- From the CAO to the front-line staff, there is need for more and better communications. We found little or no conscious desire to avoid good communications, or even opposition to a corporate approach to decision-making. So, the problem appears to lie in systems and procedures.
- Only when senior management meets routinely and as a group before and after Council meetings, can a truly corporate decision-making system function properly. It is a basic requirement of a CAO system to have senior management approve reports to Council (with a CAO sign-off, well in advance, on each report) and to meet as a corporate group to develop and implement policy, program and budget initiatives.
- It is also useful for the Mayor and Council to meet, at least once each year, with the CAO on a confidential basis, to review her goals and her performance, and that of the Town's senior management team.

Analysis

- For outward-facing communications and branding, the Town could look at Richmond Hill's Communications Strategy from October 15, 2012 as a resource.

7c. Improve administrative operations - Management systems and communications (2 of 2)

Commentary

- The fact that “human resources” issues were raised in each Task Force meeting is neither surprising nor necessarily a matter of concern. But it does point-out the degree to which workforce concerns have the potential to affect productivity, if left unaddressed.
- Management should continue to work towards improving employee engagement through opening communications and encouraging employee feedback.
- Improving and streamlining communications at the Town, including horizontal communications across departments, and vertical communications from managers to the front line would help to ensure employees remain engaged and empowered to do high-quality work. This can be achieved through several means:
 - Vertical: Hold internal departmental meetings more frequently, so that all employees are kept abreast of departmental and organizational happenings, with a more open two-way communication format.
 - Horizontal: Promote interdepartmental information sharing, both formal and informal, at the managerial level through regular senior management meetings.
 - Vertical & Horizontal: Create avenues for further cross-departmental communications between managers and professional staff to encourage information sharing on ‘best practices’ across the organization.

Recommendation

1. That the Town promote increase staff participation through: use of additional internal project-specific team meetings; continue regularly scheduled senior management meetings, following the Council meeting cycle, to review Council reports, and with reporting-out to affected staff; and, creation of avenues for cross-departmental communications to encourage “best practices” across the organization.

7d. Improve administrative operations - Better IT support to Town operations, in both timeliness and application / software support, and to aid contemporary customer-services (1 of 2)

Background and Context

- The Town makes use of an in-house network of desk-top computers and a financial information and payroll systems. Specialized systems are maintained for specific applications, such as water system operation and maintenance, tax-billing and utility billing, and so on. Council records are maintained and accessible to the public via the internet. Recreation registrations and payments can be undertaken through the internet using the Town's site. Council members can transact municipal business with the Town via the internet.
- The Town contracts with an IT service provider in Guelph, which provides prompt and reliable service. The Town office supplements this support with more immediate attention to less complex issues from a single member of staff, who undertakes those calls-for-service in addition to her regular duties.
- The Town has an attractive web presence. It is a reflection of the fact that rapid, reliable information technology is now viewed by virtually all residents and businesses as a basic requirement of municipal service delivery.
- However, computer systems are dynamic and complex. More importantly, they are evolving very rapidly, as the "Moore's Law" predicted.

Analysis and Commentary

- Until relatively recently, it was difficult for any municipal staff or Municipal Councils, in any small municipality, to justify expending taxpayers' money on computer systems and computer equipment. The focus was understandably on service-delivery and keeping costs under control.

7d. Improve administrative operations - Better IT support to Town operations, in both timeliness and application / software support, and to aid contemporary customer-services (2 of 2)

- That trend has now completely reversed, with residents and businesses demanding and expecting prompt, contemporary information technology from their municipal governments. The mushrooming growth of “apps” and smart phones makes some in-house capacity essential. There is need to deal with routine maintenance problems, and to manage the IT supplier.
- There is also a need for advice on the next wave of technology, and whether and how it should be accommodated by a small municipality with limited resources. The use of hand-held technology is revolutionizing traditional ‘blue collar’ inspection and maintenance functions. The expectation that municipal services can be accessed by smart phone and customized “apps” is likewise a challenge that needs to be managed internally, in part to standardize the approach, to protect system and data security, and to control which applications and devices should be supported and accommodated within the Town’s computer networks.
- The Town has grown to the point where information technology support can no longer be an add-on to the regular duties of a busy staff person. It likely requires a higher level of contracted IT support, or more realistically, given the Town office’s geography, someone on staff to provide dedicated information technology support, at least on a part-time basis. This person should be housed within the administration department, and would primarily lead projects to implement information technology improvements for the Town, such as the updating of the financial system and the digitalization of the Town’s records management, but would also provide daily IT maintenance and support to Town staff as needed.

Recommendation

1. That the Town engage a competent staff member to provide information technology support throughout the municipal organization (all locations) and to advise Council and senior staff on new applications, software, technology, and system and data security.

Implementation – Targets and Conditions for Success

This Study has identified a number of operational reforms on which action can be taken immediately, or in the near future. Others will require more planning and implementation, led by senior staff and Council.

StrategyCorp's experience suggests that recommendations of this scope and scale may entail organizational changes and the reallocation of human and financial resources. It properly falls to senior management, under the leadership of the CAO, to recommend an implementation plan, and any associated organizational and personnel changes

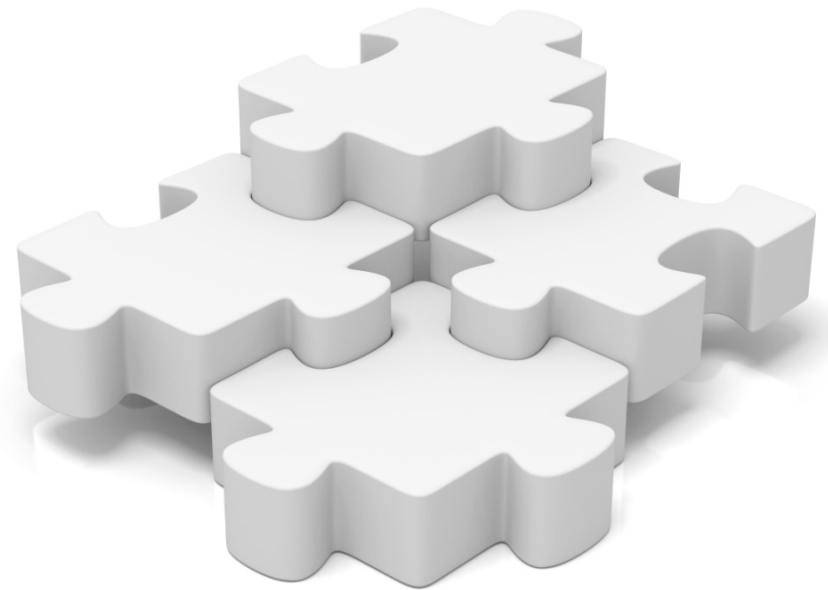
Implementation of operational reforms requires at least four pre-conditions for success:

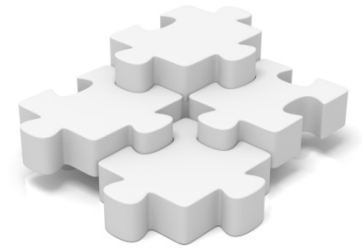
1. **Clear definition:** The purpose, objectives and expected results of the reforms.
2. **Communication with staff:** The program must be clearly and persuasively communicated to staff, stakeholders, clients, businesses and residents. Communication must be two-way and allow for feedback.
3. **Commitment by leadership:** There must be a commitment to change from political and managerial leadership.
4. **Dedicated staff leads and broad employee engagement:** The implementation program needs to be led and managed by staff who are dedicated for the purpose, and whose ability and commitment to the Town are widely acknowledged.

In a small municipality, this can be a significant challenge. However, the approach taken by the Town to revitalize economic development is a model that might be considered. Implementation of a program of operational improvements cannot be an add-on to an otherwise busy manager and staff. Moreover, having engaged staff broadly in the exercise of identifying opportunities for improvement, a similar effort should be made to involve a cross-section of staff in implementing those reforms that Town Council and senior management adopt.



Appendices





Appendix A

List of StrategyCorp Recommendations

Summary Recommendations for the Town of Erin (1 of 2)

- Following the Operational Review, StrategyCorp recommends seven (7) overall operational improvements, each with a number of specific action steps:

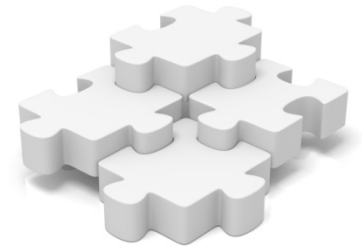
StrategyCorp Operational Review Summary Recommendations:

1. Combine maintenance activities of Roads, Water and Parks
2. Review and establish existing service levels, budget to meet those approved service levels, and develop the capacity to manage against those targeted and budgeted service levels.
3. There is need to continue recent efforts to improve staff-level customer service and the municipality's business climate; among the measures needed are:
 - a) Greater efficiency and program effectiveness in building, planning, water, and economic development
 - b) Review processes for fill permits, property standards enforcement, burning permits, etc.
 - c) Incorporate better system-standards for municipal services to new properties, including additions to the tax roll
 - d) Redesign of 'front office' / customer-facing services and associated staff duties
 - e) Creation of an 'advocate' or 'champion' within the staff complement to advocate and expedite worthwhile economic investments
4. Initiate an integrated, consistently applied program of staff development, performance evaluation, succession planning, and continuous improvement

Summary Recommendations for the Town of Erin (2 of 2)

StrategyCorp Operational Review Summary Recommendations:

5. Integrate and streamline the Recreation functions in the Town:
 - a) Management and Operations – including:
 - i. Single overall management responsibility for recreation activities / facilities across the Town;
 - ii. Distinguishing ‘outside’ maintenance activities from facilities operation and recreation programming
 - b) Standardized, regularly reviewed fee structure, with improved processes for collecting and tracking bookings and associated fee revenues;
 - c) Over time, consider greater integration of major Town recreation and leisure facilities, when existing facilities reach the end of their useful lives or require major refurbishing, including the participation of other public authorities, voluntary groups and complementary private entities
6. Greater consolidation facilities management, asset management and fleet management responsibilities, across all departments, to create a “One Erin” approach to service delivery and use of equipment / facilities
7. Improve administrative operations, including:
 - a) Improved financial management systems
 - b) Records management and storage
 - c) Management systems and communications
 - d) Better IT support to Town operations, in both timeliness and application / software support, and to aid contemporary customer-services



Appendix B

SCOPE Task Force Methodology and Processes

StrategyCorp's Operational Productivity Enhancement Program (SCOPE)

- StrategyCorp's approach to conducting the Town's operational review is based on the StrategyCorp Operational Productivity Enhancement ("SCOPE") process. The methodology and approach is reflective of best practices that the StrategyCorp team has been able to formulate based on our experience conducting operational reviews from within the Municipal Sector.
- Our approach is based on single fundamental premise: although operational and service reviews can be undertaken for a number of reasons, at their core these reviews are about improving productivity and quality.
- To that end, municipalities must make fundamental choices about what, how and where they choose to deliver services, which will in turn determine whether they deliver more (or less) service at a higher (or lower) unit cost. Our process was designed to facilitate making these choices.



The SCOPE Task Force

- A key component of the operational review involved engaging staff from the Town in a SCOPE Task Force.
- Membership of the Task Force consisted of middle and upper management and professional staff from all departments.
- In keeping with the scope of an internal operational review, the Study did not anticipate a wide, external consultation with stakeholders and clients. However, by involving Town staff from all departments and from within the professional and management ranks, the Working Groups gained a “front line” understanding of the needs of stakeholders and clients, from staff who also deal routinely with the public and all staff, including the Town’s bargaining agents and unionized workforce.
- The Task Force gave the Study an in-depth familiarity and unique perspectives on the processes and programs being examined, including their limitations and areas of underperformance, as well as opportunities for improvement.
- From the outset, SCOPE Task Force members were asked to:
 - Begin by describing in detail, and analyzing the programs and services that you provide, including their cost, staffing, changes, etc.
 - The views of your peers from other department are a good test. If fellow managers / professionals don’t understand / agree, will you convince the public or Town Council?
 - This is not a ‘slashing’ exercise. We are aiming for continuous improvement.
 - Look for areas / ideas for improved productivity, reduced cost, better service, greater efficiency.
 - Avoid proposing more staff or more funding, unless it is directly related to greater productivity, future cost-avoidance, or cost-recovery.
 - Some ideas for near-term implementation; some for the longer-term.
 - All ideas are worth considering. But move focus on priorities.

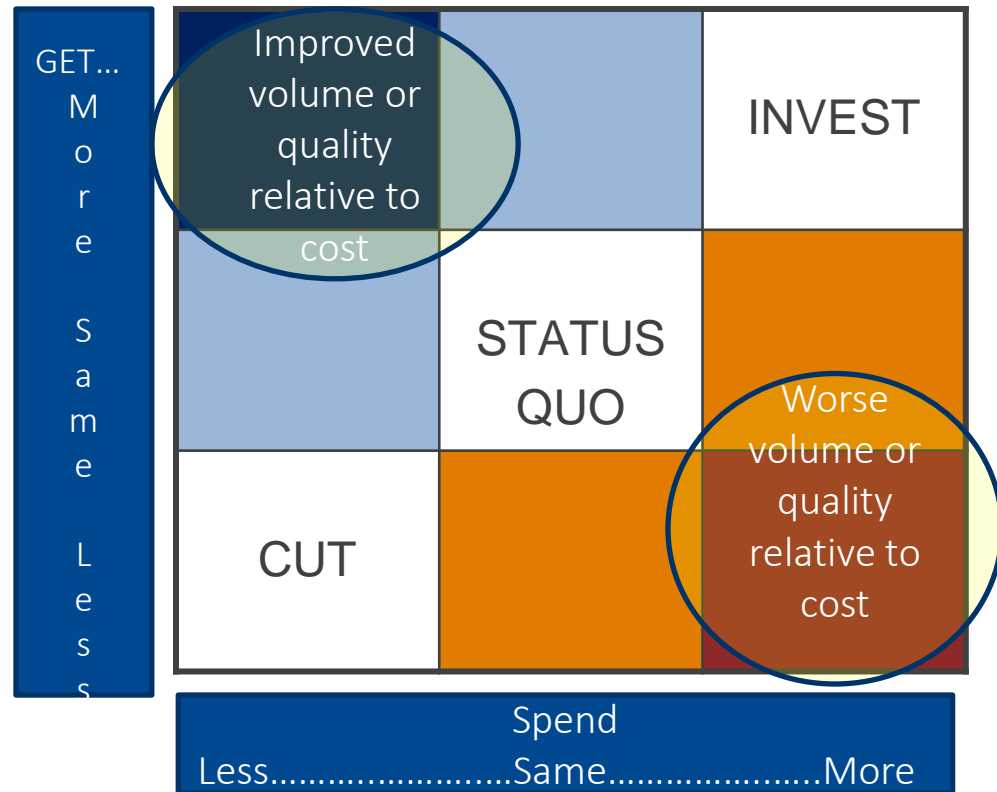
SCOPE Task Force Process

- The SCOPE Task Force met three times and examined a variety of issues affecting individual departments, as well as the Town as an organization.
- While the Task Force was given the flexibility needed to encourage active participation and fruitful discussion, Task Force meetings were guided through a process that allowed for both a broad discussion to identify a full range of issues, as well as in-depth discussions for key areas of possible improvement. The process included:
 - **Program Descriptions:** The first meeting began with brief introductions to each department at the Town, with an overview of functions and services provided. These descriptions served an educative purpose for Task Force members, and helped to set the stage for the discussions.
 - **Opportunity Identification:** Following the initial introductions, the Task Force held open discussions to identify and discuss areas of possible improvement, providing details from first-hand experience.
 - **Opportunity Refinement:** Once a list of identified opportunities had been created, the Task Force refined and organized their commentary, adding detail and context to discussion topics.
 - **Opportunity Prioritization:** The Task Force was then asked to vote for priority recommendations for the Town through a democratic voting process. Priority recommendations were listed by individual department, and for programs with impact across departments where applicable.
 - **Recommendation Finalization:** The task force then provided a list of prioritized recommendations for the Town.
- Throughout this process, StrategyCorp consultants participated on-site, helping to guide the Working Group discussions and providing additional insight into discussions, where applicable.

The SCOPE Program

SCOPE identifies identify opportunities for productivity improvement along six categories:

1. Products and Services
 - Includes operation of facilities providing services
 - Can include governance, regulation, adjudication
2. Quality, in its various aspects
 - Including distinguishing 'basic services' from 'premium services'
 - Promptness, as well as value
3. "Consumer Choice"
 - Range, geographic scope and levels of service
 - Including customization to consumer / client needs
4. Unit-Cost and All-in Cost of Services
5. Overall Cost of Service-Delivery
 - Annually, and over time, including overhead and depreciation
 - Including capital cost, on-going maintenance, legacy HR costs
6. Focus on Needs of Client, Customer & Citizen
 - Not the preferences of those party managing / delivering the service



What government gets Vs. What it spends

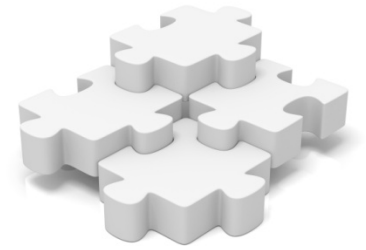
Consultation and Task Force Questions for Consideration

Both senior management and Council members who were consulted, as well as Task Force participants, were asked to consider the following questions related to Town operations:

- **Big:** Among your programs, services and activities, what is “big” in operational terms, either as a percentage of your budget, the number of staff or customers served, or in the amount of time spent on the service or activity?
- **Old:** Among your programs, services and activities, what is “old”? What has been operating in much the same fashion for a long time, or has not been seriously reviewed for a long time? What areas, if questioned, are answered with “it’s always been done this way”? Is there new technology or other changes that the Town should be considering? Why hasn’t that been done (budget limitations, lack of expertise, etc.)?
- **Growing:** Among your programs, services and activities, what is “growing”? What has seen a major increase in recent years in cost or volume or number of employees? Are there specific areas where it is growing? Why is it growing? Does it take more time? Has it seen an increase in (unmet) demand? Does it need more staff? Has its budget been growing? Have the Provincial requirements been increased, either program requirements or reporting and auditing requirements?
- **Uncompetitive:** Among your programs, services and activities, what would be seen as “unsatisfactory” [or “unpopular”]? By whom? Residents and taxpayers? Municipal clients (developers, suppliers, etc.)? Poor or slow customer service? Inability to resolve problems or accommodate reasonable requests? Obstacles to investment or doing business in the Town? Why do you think it is unpopular?

Consultation and Task Force Questions for Consideration, cont.

- **Shared:** Among your programs, services and activities, are there important responsibilities that are “shared” with others, especially in terms of service-delivery, regulation, facility operation, etc.? With which organizations – the Town? Local voluntary groups or associations? Neighbouring municipalities? Provincial or Federal agencies? Contractors / the private sector? Have challenges in sharing led to problems or sub-optimal performance? Are there programs, services or activities that are not currently being shared that may benefit from sharing?
- **Satisfaction:** Among your programs, services and activities, which are proving to be politically “sensitive”, or were raised as issues during the run-up to the recent election campaign, and in the media and candidate comments during and following the election? What issues need attention to resolve political complaints or dissatisfaction? Which issues are not being addressed to the satisfaction of council members? Which issues, large or small, seem to recur at Council and with individual Council members, and should be addressed? What are the political “lightning rods” or media criticisms? How would you clear away the small irritants? What does the Town need to do to address the bigger issues of political sensitivity?
- **Strategy:** Among your current or potential programs, services and activities, to which big issues should Council and the Administration and the Erin communities be giving “strategic” focus? Are there major projects or initiatives that the Town should be taking-on? What strategic priorities do you personally feel should be getting “strategic” attention? What barriers are there to giving them that attention (money, leadership, time, public interest, political interest, etc.)? What is preventing the Town from delivering on those things that have been identified as strategically important?



Appendix C

Works Cited

People Consulted

Mayor & Councillors

Al Alls, Mayor
Jeff Duncan, Councillor
John Brennan, Councillor
Matt Sammut, Councillor
Rob Smith, Councillor

Administration

Kathryn Ironmonger, Town Manager/CAO
Dina Lundy, Clerk
Connie Cox, Executive Assistant & Webmaster
Trish Crawford, Corporate Services and Clerk's Assistant

Treasury

Sharon Marshall, Director of Finance
Larry Wheeler, Financial Analyst
Louise Warn, Tax & Water Revenue Administrator

Fire & Emergency Services

Shelley Ballantyne, Roads, Fire and Building administrative assistant

Third Parties

Murray Short, RLB LLP – Chartered Accountants and Business Advisors (Municipal Auditor for Erin)

Building , Planning & By-Law Enforcement

Andrew Hartholt, Chief Building Official
Harold Knox, Building Inspector, Municipal By-Law & Property Standards Officer

Roads

Larry Van Wyck, Roads Superintendent
Kevin Watson, Lead Hand

Water

Joe Babin, Interim Water Superintendent & Water Works Foreman

Recreation

Graham Smith, Parks & Recreation Manager & Erin Community Centre Facility Manager
Brandi McLeod, Parks Manager

Economic Development

Bob Cheetham, Economic Development Coordinator

Wellington County

Scott Wilson, Chief Administrative Officer
Gary Cousins, Director of Planning and Development
Gord Ough, County Engineer

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Capital Asset Planning

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- Ontario Good Roads Association. *A Guideline for Preparing for and Decommissioning Winter Operations*. <http://ograapps.com/best-practices/>
- Ontario Good Roads Association. *A Guideline for Winter Weather Monitoring*. <http://ograapps.com/best-practices/>



Toronto Office

145 King Street East,
2nd Floor, Toronto, ON
M5C 2Y7

(T) 416-864-7112

(F) 416-864-7117

Ottawa Office

100 rue Queen Street
Suite 550
Ottawa, ON
K1P 1J9

(T) 613-231-2630

(F) 613-231-4113



Public Affairs / Management Consulting / Communications

strategycorp.com