



*A People Place, A Change of Pace*  
**SHELBURNE**  
ONTARIO, CANADA

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**Meeting Date:** Monday, January 09, 2023

**To:** Mayor Mills and Members of Council

**From:** Denyse Morrissey, Chief Administrative Officer

**Report:** CAO 2023-01

**Subject:** Operations Review Town of Shelburne – Report and Recommendations

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### Recommendation

Be it Resolved that Council:

1. Receives report CAO 2023-01 Operations Review Town of Shelburne – Report and Recommendations for information; and that
2. The additional three labourer positions recommended be included in the draft 2023 operating budget of the Development and Operations Department for the consideration of Council.

### Background

On January 25, 2022, the Town was advised by Minister Clark, Ministry of Municipal Affairs and Housing that the project would receive \$81,408 in funding for the Operations Review under Municipal Modernization Fund Third Intake. With the grant funding received the project was fully funded at 100%.

Like the funding requirements for the SDR under the second intake of the program, the Operations Review project had to be completed by an independent third-party organization, consultant or firm. The operations review was completed by Optimus SBR.

Final reports must be submitted to the Ministry by January 31, 2023.

The Operations Review grant submission included the general scope of work:

- To implement the recommendations of the Service Delivery Review
- Evaluate process' to create more standards in a range of service areas such as public works and parks.
- Identify opportunities to increase or augment revenue and reduce costs without sacrificing the quality of the services.
- Conduct a full operational review with a focus on key activities associated with public works, roads, utilities, and parks, trails and recreation activities.
- Further review of staffing levels, staffing practices, use of technology, roles and responsibilities across operational service areas and divisions (of the department of development and operations.
- Review fleet management and fleet management planning.
- Review the future operational needs for the Town to incorporate indoor recreation as a potential direct service of the Town.
- Bench marking with other municipalities would also be completed.

### **Past Service Delivery Review Reports**

The links to past reports are provided:

February, 14, 2022 CAO 2022-01:

[Operations Review Town of Shelburne – Municipal Modernization Program Third Intake \(escribemeetings.com\)](https://www.escribemeetings.com/Operations%20Review%20Town%20of%20Shelburne%20-%20Municipal%20Modernization%20Program%20Third%20Intake)

November 22, 2021, SDR presentation to Council by Optimus SBR:

[Presentation to Council, November 22, 2021 \(escribemeetings.com\)](https://www.escribemeetings.com/Presentation%20to%20Council%20November%2022%2C%202021)

Full SDR report is

[SDR Future State Report November 2021 \(escribemeetings.com\)](https://www.escribemeetings.com/SDR%20Future%20State%20Report%20November%202021)

## Analysis

The focus of the Operations Review was on the following areas:

- Structure and Staffing
- Processes and Service Delivery
- Service KPIs and Communications for the Department

Optimus SBR will be presenting the summary report to Council at this meeting. It is provided in Appendix 1 - Town of Shelburne – Development and Operations - Final Future State report, December 13, 2022: Summary Version.

Town of Shelburne – Development and Operations - Final Future State report, December 13, 2022: Full Report is provided in Appendix 2.

Opportunities for improvement related to the structure of the Department and the staffing, included that additional staff resources are needed and be considered to meet the growing needs of the Town.

The recommended positions, as of Q2 2022, and cost estimates\*included:

New labourer/operator positions	3	\$240,000 - \$250,000
Operations Data Analyst	1	\$85,000

\*salary plus employer contributions costs of WSIB, EA, CPP, OMERS, health care benefits

It is recognized that not all recommendations may be implementable concurrently or as of Q2 2023 or in 2023. A priority based multi-year phased in timeline will need to still be developed in 2023 and 2024 and where applicable, funded.

This report has recommended that three (3) labour/operator positions be considered in the 2023 draft budget based on hiring in Q2 or April 2023. The position of Operations Data Analyst which is critical to the development of new operational standards, tracking and measurements and implementation of many of the recommendations from the Operations Review, would be deferred to 2024 and considered in that draft budget. The position could be reconsidered in 2023 if funding other opportunities became available.

Town of Shelburne – Development and Operations - Final Future State report, December 13, 2022: Summary Version is provided in Appendix 1.

Key Opportunities from the Operations Review are listed in the summary report, as prepared by Optimus under each area of analysis on the charts that follow:

<b>Opportunity</b>	<b>Resource Requirements and Costs</b>	<b>Estimated Timelines (calendar year)</b>
<b>SS1a:</b> <i>Restructure Development and Operations Team to have teams assigned to the following service areas based on need: Utilities, Roads and Operations, and Parks and Recreation. Accordingly determine the staffing complement.</i>	Addition of three (3) full-time staff beginning 2023. Estimated cost of \$200,000-\$250,000 per year, ongoing.	Q1 2023
<b>SS1b:</b> <i>Establish Supervisor backup for the Roads and Operations Team. This does not require hiring a 'new-new' individual but rather could consider placing additional responsibilities upon one more existing staff members.</i>	No additional resources required.	Q1 2023
<b>SS1c:</b> <i>Establish new position for a Data Analyst to support collection, validation, and analysis of Labourer data related to scheduling, work activities and cost allocations.</i>	Addition of one (1) full-time staff beginning 2023. Estimated cost of \$85,000.	Q1 2023

<b>Opportunity</b>	<b>Resource Requirements and Costs</b>	<b>Estimated Timelines (calendar year)</b>
<b>SS2:</b> <i>Establish internal guidelines / commitments for team communications, updates</i>	No additional resources required.	Q2 2023 – Q4 2023
<b>PSD1:</b> <i>Clearly document the next phase of Citywide implementation and Ensure accompanying staff training</i>	No additional resources required for next phase plan.	Q1 2023 – Q3 2023
<b>PSD2:</b> <i>Revise time tracking requirements to collect information in greater detail on specific tasks and activities in all Development and Operations areas.</i>	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst new hire (Rec SS1c).
<b>PSD3:</b> <i>Develop policies and procedures (process documentation) for Development and Operations Activities</i>	No additional resources required.	Q1- 2023 – Q1 2024
<b>PSD4:</b> <i>Develop a formal training and onboarding process for new hires in the Development and Operations Department</i>	No additional resources required.	Q1- 2023 – Q1 2024

<b>Opportunity</b>	<b>Resource Requirements and Costs</b>	<b>Estimated Timelines (calendar year)</b>
<b><i>PSD5:</i></b> Investigate requirements regarding backflow prevention equipment to ensure good practice is followed	No additional resources required.	Q1 2023
<b><i>PSD6:</i></b> Explore opportunities to reduce staff time allocated to Water Meter kit assembly	No additional resources required. Some Cost Savings anticipated.	Q1 2023
<b><i>PSD7:</i></b> Identify and assess options to support the pre-deployment of winter control surface and common road repair materials to central location(s) in Town; use existing Town facilities for staff break time.	Small costs associated with pre-deployment of materials (less than \$10,000). Some Cost Savings anticipated from reduced travel times (fuel costs, staff time)	Q4 2022 – Q1 2023
<b><i>PSD8:</i></b> Align Grass Cutting Operations to Service Level expectations for grass cutting across the Town.	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst new hire (Rec SS1c) and KIPs (SCK2).

<b>Opportunity</b>	<b>Resource Requirements and Costs</b>	<b>Estimated Timelines (calendar year)</b>
<b><i>PSD9:</i></b> Review and revise contractor model for grass cutting across all needs of the Town following Service Level review (PSD8) above.	Cost savings anticipated in year one (less than \$10,000). Long-term costs/savings to be determined in cost-benefit analysis.	Q2 2023 – Q1 2024
<b><i>PSD10:</i></b> Develop and implement volunteer program for Parks and Recreation support	No additional resources required.	Q3 2023
<b><i>PSD11:</i></b> Review existing field rates, booking process, and corresponding contracts	No additional resources required.	Q2 2023
<b><i>PSD12:</i></b> Develop and implement a non-monetary donations policy	No additional resources required.	Q4 2023
<b><i>SKC1:</i></b> Enhance a Council Orientation Package and Process	No additional resources required.	Q2 2023
<b><i>SKC2:</i></b> Develop KPIs for Development and Operations Activities	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst (Rec SS1c)

## Financial

The recommended positions as of Q2 2023 and cost estimates\*:

New labourer/operator positions	3	\$240,000 - \$250,000
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\*salary plus employer contributions costs of WSIB, EA, CPP, OMERs, health care benefits

## Policies & Implications

Not applicable

## Consultation and Communications

Not applicable

## Council Strategic Priorities

Council's Strategic Priorities 2019-2022 has three Goals - Sustainable, Engaged and livable. There are a total of 12 targets with the three Goals.

This report aligns with the Sustainable Goals within the Targets:

Target T2 Municipal Services Review and Evaluation

## Supporting Documentation

Appendix 1: Town of Shelburne – Development and Operations - Final Future State report, December 13, 2022: Summary Version

Appendix 2: Town of Shelburne – Development and Operations - Final Future State report, December 13, 2022: Full Report

Respectfully submitted:

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Denyse Morrissey, CAO





# Town of Shelburne

Review of Development and  
Operations Department

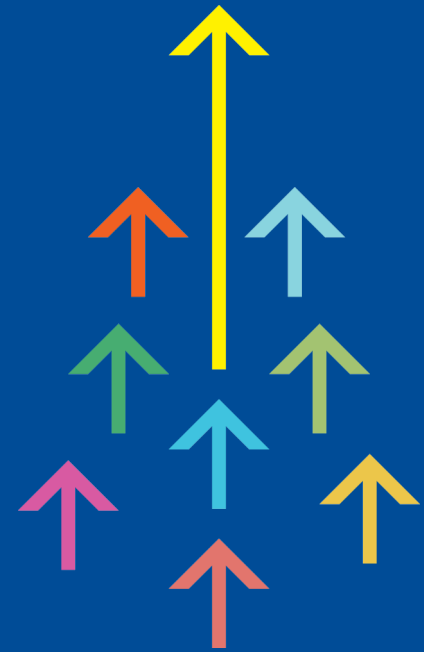
Future State Report  
Summary Version



December 13, 2022



*A People Place, A Change of Pace*  
**SHELBURNE**  
ONTARIO, CANADA



## Review of Development and Operations Department

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→ Future State Report

## → Contents

1. Project Overview and Current State
2. Future State Opportunities and Recommendations
3. Appendix
  - Current State Context

December 13, 2022



→ Review of Development and  
Operations Department

## 1. Project Overview and Current State

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# Context of the Review

*This Review of the Development & Operations Department represents a follow-through on recent Service Delivery Review Recommendations to enhance the delivery of Town services and improve operational efficiencies.*

- In the Fall 2021, the Town of Shelburne completed a Service Delivery Review (SDR) that involved a review of service delivery across the Town. A key recommendation from that report was to:
  - *Conduct an Operational Review of the Development & Operations Department (Recommendation DEV1). The 2021 Fall SDR also included a recommendation to Separate Parks and Recreation Function from Public Works (Recommendation DEV2).*

Opportunity Area	Improvement Opportunity	Rationale	Dept. Impacted
B Development & Operations (DEV)	DEV1: Conduct an Operational Review of the Development & Operations Department	Conduct full Operational Review with focus on key activities associated with Public Works, Utilities, and Parks/Recreation activities. Including: KPIs, Staffing Levels, Staffing Practices, Use of technology, Roles and Responsibilities across PW, Parks, Utilities; Equipment / Fleet Management and asset management planning	Development & Operations CAO's Office
	DEV2: Separate Parks and Recreation Function from Public Works	To support increasing demand/focus on Parks and Recreation; to support potential incorporation of CDRC into Town operations	Development & Operations CAO's Office
		Consideration should also be given to increasing staff capacity to support outdoor events/coordination.	

## Recommendations DEV1 and DEV2 from the November 2021 Service Delivery Review completed for the Town of Shelburne

- Following the completion of the 2021 SDR, the Town applied for grant funding from Ministry of Municipal Affairs and Housing as part of the Municipal Modernization Fund (MMF). This application was successful, and the funding allocated to conduct the Review of the Development & Operations Department. This report represents the findings from this review, and costs have been covered by the grant received by the Town of Shelburne.

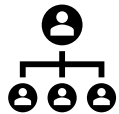
*Note1: This review is focused on services operated by the Town. Specifically, operations of the Centre Dufferin Recreation Complex (CRDC) are not included in this review. In 2020 an SDR completed for the County of Dufferin and member Municipalities included recommendations related to the dissolution of the boards of management within the scope of the review (Fire and Indoor Recreation Services). That SDR recommended that these service areas would be directly delivered by the Town of Shelburne as well a set of recommendations to incorporate Centre Dufferin Recreation Complex (CDRC) as a part of the Town's strategic priorities. The original scope of the SDR considered exploring the impact of the dissolution of the boards of management. However, as consultations between the Town of Shelburne and neighbouring municipalities currently involved in both Boards of Management are ongoing, detailed planning considerations were not included in this review. Rather, the review has considered the possibility that these services may become a Town-delivered service in the future (as opposed to recommendations based on an agreed upon timeline or MOU for service delivery).*

# Project Context



In the fall of 2021, the Town of Shelburne (“Town”) completed a **Service Delivery Review** that examined the organizational structure, staffing and services provided by the Corporation. That review highlighted the opportunity to examine the current Development and Operations department in greater detail.

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The **Development and Operations Department** has been providing a greater level and diversity of services as a result of the Town’s continued growth. This includes activities associated with public works, roads, and utilities as new developments have been built, as well as a greater focus on parks and recreational activities.

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Optimus SBR was contracted to lead the **operations review to explore opportunities related to improving the efficiency of the department**, with the overall goal of supporting the department’s ability to make proactive, evidence informed decisions and effectively deliver the services expected by Town residents.

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# Project Mission and Success

## → Project Mission

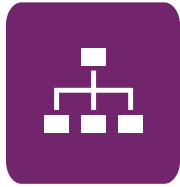
- To conduct a review of the Town of Shelburne's Development and Operations Department to ensure the department is positioned to support the Town's continued growth and a greater level and diversity of services expectations.
- This includes operational activities associated with public works, roads, and utilities as new developments have been built, as well as a greater focus on parks and recreational activities.

## → Project Success

- Establish recommended service levels or performance mechanisms (metrics, KPIs etc) to guide decisions, investments and process in level of services to be provided to residents
- Greater confidence in the ability to move from a reactionary approach to services to a more data driven approach to how services are scheduled, managed and delivered.
- Enhanced alignment between how work is managed and emerging priorities
- Clarity around problem areas and their underlying causes related to the delivery of services within the Department

## Focus Areas

The focus of this review has been on the following areas: Structure and Staffing, Processes and Service Delivery, and Service KPIs and Communications for the Department.



### Structure and Staffing

- Increased pressure on staff to switch responsibilities between Public Works and Parks and Recreation operations.
- Recognition of the differing requirements of Public Works functions and those of Parks and Recreation.
- Need for clear definition of roles and responsibilities in a new structure where the two functions are separated.
- Clarity is required on staffing levels associated with Public Works and Recreation services and summer to winter activities.



### Processes and Service Delivery

- Possible requirement for additional equipment to meet increased demands from a growing population.
- Increased efficiencies resulting from the implementation of the GIS/Workorder system – opportunities to further leverage.
- Several of the Department's staff working overtime due to increased responsibilities coupled with recruitment challenges in hiring new staff.
- Increased use of online systems particularly during COVID-19 pandemic.



### Service KPIs and Communications

- General satisfaction overall with the level of responsiveness and interaction with the Department staff and the services provided (based on Council consults, for this review and previous SDR work).
- Increased emphasis on adding new services/facilities - dog parks, cricket fields, tennis grounds, splash pad etc.
- Need for organized provision of services by the staff during non-traditional hours such as the evenings when most parks and recreational facilities are used.
- Need for a more formal system of work orders.
- Absence of an allocation policy and fee considerations for facility utilization.



→ Review of Development and  
Operations Department

## 2. Future State Opportunities & Recommendations

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# Key Opportunities

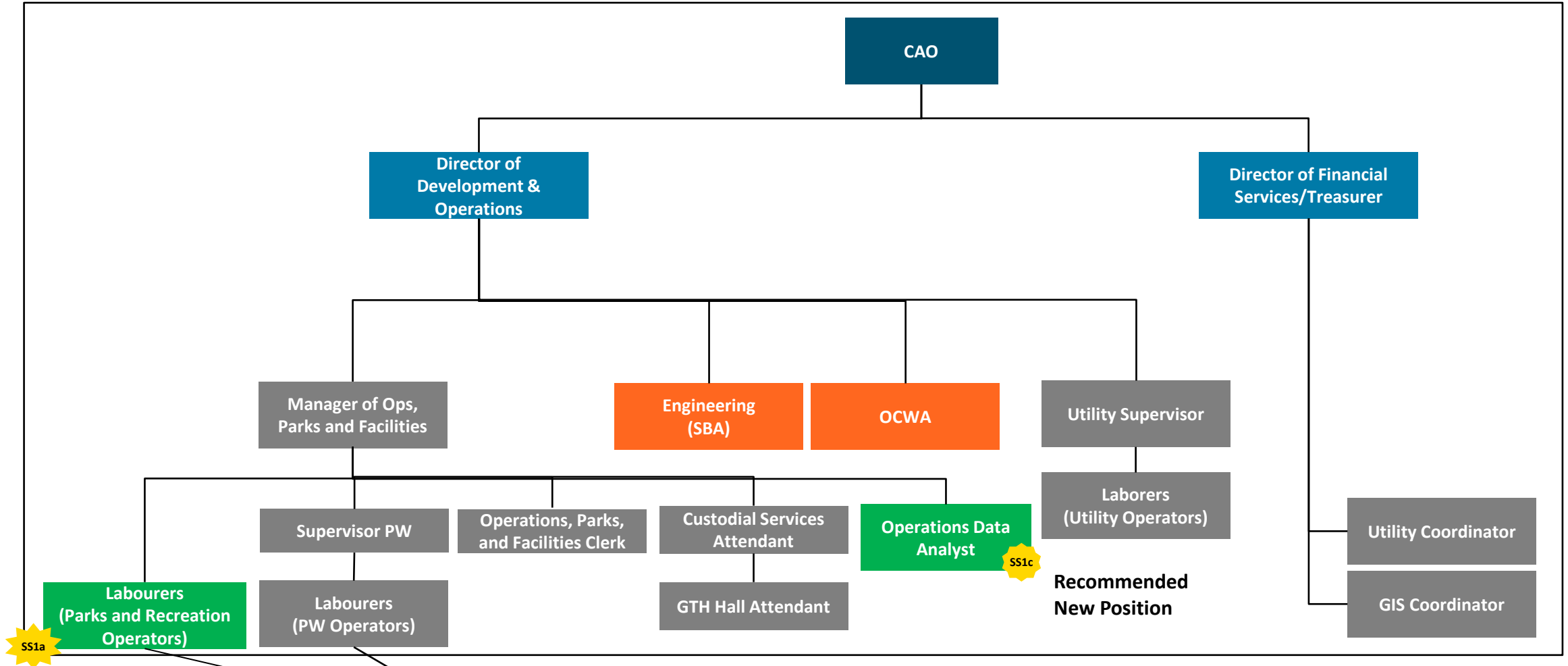
Opportunities for improvement related to the structure of the Department and the staffing:

Review Focus Alignment	Improvement Opportunity	Rationale
Structure and Staffing	<b>SS1: Revise Structure of Development and Operations Team</b>  <b>SS1a:</b> <i>Restructure Development and Operations Team to have teams assigned to the following service areas based on need: Utilities, Roads and Operations, and Parks and Recreation. Accordingly determine the staffing complement.</i>  <b>SS1b:</b> <i>Establish Supervisor backup for the Roads and Operations Team. This does not require hiring a 'net-new' individual but rather could consider placing additional responsibilities upon one more existing staff members.</i>  <b>SS1c:</b> <i>Establish new position for a Data Analyst to support collection, validation, and analysis of Labourer data related to scheduling, work activities and cost allocations.</i>	<p>Dedicated focus (prioritization of activities; schedule of staff; KPI tracking) for parks and recreation, roads/operations, and utilities</p> <p>Option could include three functions:</p> <ul style="list-style-type: none"> <li>▪ Development, Planning and Utilities (Engineering; OCWA)</li> <li>▪ Public Works/Operations (Roads, etc.)</li> <li>▪ Parks, Recreation, and Culture</li> </ul> <p>Ensure appropriate resourcing and support for the Development and Operations Team.</p>
		Provide requirements for data (timesheet and work activities) collection, establish standards for data integrity and reporting, analyze data for opportunities to optimize labourer allocation across the service areas.
	<b>SS2:</b> <i>Establish internal guidelines / commitments for team communications, updates</i>	Improved communication and information sharing. Opportunity to enhance staff recognition; opportunity for reviews/refreshers on new policy or procedures, etc.

The following two slides provide additional details on recommendation SS1a-c including Organizational Structure and staffing level requirements.

# Key Opportunities

Recommended Future State Structure – Recommendation SS1a



SS1a

SS1c

Recommended  
New Position

Recommended  
Structure Change

See next slide for  
staffing level  
considerations

# Key Opportunities

In addition to establishing Parks and Recreation and Operations/Public Works service area teams within the Development and Operations Department, additional staff resources should be considered to meet the growing needs of the Town.

- To establish a baseline of staff resources needed for the Parks/Recreation and Public Works service areas, the review team used recent budget figures which allocate staff costs to parks and operations activities.
  - Approximately 65% of staff costs are allocated to Public Works, with 35% allocated to Parks/Recreation
- Moving forward, the team has assumed an increase in the allocation towards Parks/Recreation for a 60-40 split between activities.
- Furthermore, to accommodate for anticipated Town growth, an estimated 50% increase in personnel have been estimated for. This represents an additional three FT staff. This would support Town growth and address shortcomings in staffing observed during the review. This addition will support additional population growth and provision of services to new sub-division areas and new infrastructure in the Town including the Dog Park and Splash Pad.
- Based on these assumptions, a recommended staff consideration to the service areas is presented as follows:
  - Parks and Recreation –
    - 3 Full Time
    - 5 Seasonal
  - Operations/Public Works –
    - 5 Full Time
    - 4 Seasonal
- Note, as the Town continues to grow, implements this revised structure, and can gain further insights through improved collection and analysis of timesheet and work activities data, consideration for a Labourer “pool” of resources will be required. This would involve designating some staff to move between the Parks and Recreation, Operations/Public Works, and Utilities teams based on time of year.
  - Traditionally this would involve staff working in the Parks and Recreation group during the summer months, and Operations/Public Works during winter months to assist with winter control activities.

# Key Opportunities

Opportunities for improvement related to the processes and service delivery within the Department:

Review Focus Alignment	Improvement Opportunity	Rationale
Processes and Service Delivery	<b>PSD1:</b> Clearly document the next phase of Citywide implementation and ensure accompanying staff training	Clear prioritization of next step investments/time requirements based on priority impacts
	<b>PSD2:</b> Revise time tracking requirements to collect information in greater detail on specific tasks and activities in all Development and Operations areas.	There is minimal data regarding Development and Operations activities that shows time spent and work efforts to support analysis of staff scheduling, utilization, and team capacity to deliver existing/ongoing operations and/or take on new projects.
	<b>PSD3:</b> Develop policies and procedures (process documentation) for Development and Operations Activities	Formal documentation of activities completed by the Development and Operations Team to support training and compliance
	<b>PSD4:</b> Develop a formal training and onboarding process for new hires in the Development and Operations Department	Enhanced new employee onboarding experience; reduce time for new staff to 'ramp-up' on operations processes and procedures
	<b>PSD5:</b> Investigate requirements regarding backflow prevention equipment to ensure good practice is followed	Clarity on compliance concerns; opportunity to ensure costs are recovered from customers
	<b>PSD6:</b> Explore opportunities to reduce staff time allocated to Water Meter kit assembly	Ability to redeploy staff to higher-value activities; reduced liability for damaged meters; reduced need for storage requirements.
	<b>PSD7:</b> Identify and assess options to support the pre-deployment of winter control surface and common road repair materials to central location(s) in Town; use existing Town facilities for staff break time.	Develop a decentralized approach to replenishing road materials (initially winter control surface materials), as well as providing the staff with lunch and break options that reduce the time spent traveling back and forth to the Luxton yard. This will reduce time requirements to complete existing winter control routes; improved service levels; potential for reduced fuel costs.

# Key Opportunities

Opportunities for improvement related to the processes and service delivery within the Department:

Review Focus Alignment	Improvement Opportunity	Rationale
Processes and Service Delivery	<b>PSD8:</b> Align Grass Cutting Operations to Service Level expectations for grass cutting across the Town. See Recommendation SKC02 for additional information on recommended KPI development and reporting.	Clarity on service expectations, requirements, and communication with residents and stakeholders; include existing sports fields and new facilities such as a permanent Cricket pitch; ability to better estimate service costs/value. This should be aligned to the involvement of the Data Analyst role (recommendation SS1c), as well as the analysis of time sheets and activities (Recommendation PSD2). This Recommendation is also aligned to Recommendation SKC2 - Develop KPIs for Development and Operations Activities
	<b>PSD10:</b> Review and revise contractor model for grass cutting across all needs of the Town following Service Level review (PSD8) above.	Review use of funds spent on third-party vendor; add Greenwood Park Soccer Fields to the Town's Grass Cutting routes (ending use of external vendor) with consolidation of grass cutting at Greenwood Park to Town staff; potential of using a vendor on other areas such as boulevards or large park areas
	<b>PSD10:</b> Develop and implement volunteer program for Parks and Recreation support	Potential to offset some costs associated with light park maintenance/upkeep for a limited time period; development community engagement opportunities
	<b>PSD11:</b> Review existing field rates, booking process, and corresponding contracts	Enhance customer experience when booking; ensure rates and fees reflect use of fields for all sports and activities; reduced staff time associated with finalizing facility booking
	<b>PSD12:</b> Develop and implement a non-monetary donations policy	Clarity surrounding communications with residents regarding non-monetary donations; ability to ensure alignment with the Town's strategic directions/the specific site plans related to the donation; formal consideration of ongoing liability assumed by the Town

# Key Opportunities

Opportunities for improvement related to service KPIs for the Department and Communications (internal and external):

Review Focus Alignment	Improvement Opportunity	Rationale
Service KPIs and Communications	<b>SKC1:</b> Enhance a Council Orientation Package and Process	Reduction in misinformation provided to residents; enhanced Council understanding of Development and Operations activities.
	<b>SKC2:</b> Develop KPIs for Development and Operations Activities	Ability to make evidence informed decisions on an ongoing basis; enhanced transparency to residents and Council

# Key Opportunities

Opportunities for improvements that were heard during sessions with staff which are related to Town-wide HR concerns:

Review Focus Alignment	Improvement Opportunity	Rationale
Human Resources – Town-Wide Opportunities	<b>HR1:</b> Determine action resulting from review of Compensation Policies and Levels for Development and Operations Staff	Ensure alignment with peer municipalities / good practice from the Compensation Market review; opportunity to address and respond directly to staff feedback and comments
	<b>HR2:</b> Refresh (as needed) and relaunch Formal Performance Reviews for the Development and Operations staff	Addresses identified gap in existing Development and Operations practices; better alignment with good practice for employee development; growth; and retention.
	<b>HR3:</b> Provide clear articulation of the support role that the new HR Coordinator will provide to staff	

# Key Opportunities Summary

Opportunity	Resource Requirements and Costs	Estimated Timelines (calendar year)
<b>SS1a:</b> Restructure Development and Operations Team to have teams assigned to the following service areas based on need: Utilities, Roads and Operations, and Parks and Recreation. Accordingly determine the staffing complement.	Addition of three (3) full-time staff beginning 2023. Estimated cost of \$200,000-\$250,000 per year, ongoing.	Q1 2023
<b>SS1b:</b> Establish Supervisor backup for the Roads and Operations Team. This does not require hiring a 'new-new' individual but rather could consider placing additional responsibilities upon one more existing staff members.	No additional resources required.	Q1 2023
<b>SS1c:</b> Establish new position for a Data Analyst to support collection, validation, and analysis of Labourer data related to scheduling, work activities and cost allocations.	Addition of one (1) full-time staff beginning 2023. Estimated cost of \$85,000.	Q1 2023
<b>SS2:</b> Establish internal guidelines / commitments for team communications, updates	No additional resources required.	Q2 2023 – Q4 2023
<b>PSD1:</b> Clearly document the next phase of Citywide implementation and Ensure accompanying staff training	No additional resources required for next phase plan.	Q1 2023 – Q3 2023
<b>PSD2:</b> Revise time tracking requirements to collect information in greater detail on specific tasks and activities in all Development and Operations areas.	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst new hire (Rec SS1c).
<b>PSD3:</b> Develop policies and procedures (process documentation) for Development and Operations Activities	No additional resources required.	Q1- 2023 – Q1 2024
<b>PSD4:</b> Develop a formal training and onboarding process for new hires in the Development and Operations Department	No additional resources required.	Q1- 2023 – Q1 2024
<b>PSD5:</b> Investigate requirements regarding backflow prevention equipment to ensure good practice is followed	No additional resources required.	Q1 2023
<b>PSD6:</b> Explore opportunities to reduce staff time allocated to Water Meter kit assembly	No additional resources required. Some Cost Savings anticipated.	Q1 2023
<b>PSD7:</b> Identify and assess options to support the pre-deployment of winter control surface and common road repair materials to central location(s) in Town; use existing Town facilities for staff break time.	Small costs associated with pre-deployment of materials (less than \$10,000). Some Cost Savings anticipated from reduced travel times (fuel costs, staff time)	Q4 2022 – Q1 2023
<b>PSD8:</b> Align Grass Cutting Operations to Service Level expectations for grass cutting across the Town.	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst new hire (Rec SS1c) and KIPs (SCK2).
<b>PSD9:</b> Review and revise contractor model for grass cutting across all needs of the Town following Service Level review (PSD8) above.	Cost savings anticipated in year one (less than \$10,000). Long-term costs/savings to be determined in cost-benefit analysis.	Q2 2023 – Q1 2024
<b>PSD10:</b> Develop and implement volunteer program for Parks and Recreation support	No additional resources required.	Q3 2023
<b>PSD11:</b> Review existing field rates, booking process, and corresponding contracts	No additional resources required.	Q2 2023
<b>PSD12:</b> Develop and implement a non-monetary donations policy	No additional resources required.	Q4 2023
<b>SKC1:</b> Enhance a Council Orientation Package and Process	No additional resources required.	Q2 2023
<b>SKC2:</b> Develop KPIs for Development and Operations Activities	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst (Rec SS1c)





→ Review of Development and Operations Department

### 3. Appendix – Current State Context

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**The following slides provide details regarding the Primary Activities and Team Structure for the Development and Operations Department. Additional information on Team Processes and Workflows; Equipment, tools, technology, vehicles, and facilitates; Communications, KPIs, and outcomes can be found in the Full Current State Report.**

# Primary Activities

## Primary Activities

*The Development and Operations team includes Operations staff that are responsible for the Town's road network and general public works activities.*

### Activities

#### The Network

- The total length of roadways according to the latest Asset Management Plan dated June 2022 is 38.90 kilometers, consisting of 34.8 kms. of asphalt base or surface and 4.1 kms. gravel. The total lane kilometers of the roadways is stated as 70.74 kilometers.
  - All Road Key Performance Indicators are monitored to Reliability, Safety, and Responsiveness to achieve a 100% compliance to stated metrics. Responsiveness is noted within 1 business day following contact via phone or email.
  - There are approximately 31 kilometers of sidewalks that are maintained by the Town.
- There are 142 culverts and 3 pedestrian bridges maintained by the Town
  - All Bridge and Culvert Key Performance Indicators are monitored with respect to Reliability, Safety, and Responsiveness and have similar 1 business day response time noted above.

#### Summer Maintenance Activities

- Summer activities include miscellaneous road and sidewalk repairs, resurfacing and gravelling, repainting pavement markings, roadside maintenance (mowing, ditching, shouldering), Street sweeping, dust control and culvert replacement.

#### Winter Maintenance Activities

- Winter control maintenance is performed under a priority system. Snow plowing prioritizes the streets such as Greenwood Street, Fiddle Park Lane, Simon Street and Victoria Street to be cleared first, followed by local residential streets, crescents and courts. GPS units in the winter vehicle ensures that each route is serviced to schedule. In addition, there are four Sidewalk Clearing Routes defined as Downtown #1 and #2, School #1 and #2, also organized to prioritize the snow removal from sidewalks.

#### Year-Round Activities

- Sign and Light Inspections and maintenance, Traffic Logix signs placement, vehicle and equipment inspection and minor maintenance, garbage clearing from fence lines and ditches, tree clearing, repairs to boulevards.

# Primary Activities

## Primary Activities

*The Development and Operations team includes Operations staff are also responsible for parks and recreational activities, special events, and cemetery operations.*

### Activities

#### Parks Facilities:

- The Development and Operations team maintains the grounds for over 43 hectares of park and facilities across 13 different parkland areas in the Town of Shelburne. Within these parks are contained:
  - Sporting/Recreation facilities including: 7 Soccer pitches, 4 Baseball diamonds, 2 Basketball courts (one full, one half-court), 14 play structures, 6 Swing sets, 9 slides, a BMX track and a Skateboard Park, 3 Outdoor ice rinks, 1 skating track
  - Comfort/Other Structures including: 3 Washroom Buildings, 2 Pedestrian Bridges, 1 Boardwalk, 2 Pavilions, 1 Gazebo, 1 Shade Shelter, 1 Fiddle Park Building, 2 Storage and 1 Garage structure
  - 5.6 kms of maintained public trails
  - Additions to facilities in 2021 and 2022: tennis court, cricket pitch, splash pad, off-leash dog park
- The Centre Dufferin Recreational Complex is jointly owned by the Towns of Shelburne and Mono, and the Townships of Amaranth and Melancthon. The CDRC Complex includes 2.2 hectares of grounds, 1 indoor ice rink, 1 outdoor pool, recreation facilities and meeting rooms. *Its operations are not part of the Town of Shelburne's Development and Operations team.*

#### Activities:

- The Parks' activities consist of both on-going and seasonal opening/closing requirements. These include:

#### On-going activities

- Summer: Grass-cutting, pesticide control, and sports field preparation and maintenance
- Public washroom cleaning and maintenance
- Winter: Ice Rink and skating track maintenance
- Trail Maintenance, Tree inspections and trimming
- Playground and splash pad inspections and maintenance
- Park and Downtown Garbage collection, Dog park inspection and maintenance

#### Seasonal opening/closing activities

- Painting/building picnic tables
- Preparation and close-down of Public washroom facilities
- Seasonal cleaning of parks, Fiddle Park snow dumpsite, placement and removal of garbage bins
- Leaf cleanup
- Place / Remove Benches in Downtown and Picnic Tables in Parks

# Primary Activities

## Primary Activities

*The Development and Operations team includes Operations staff are also responsible for parks and recreational activities, special events, and cemetery operations.*

### **Parks Activities (continued):**

- There are also three other areas, currently seen as Parks and Facilities activities that are staffed by the Development and Operations team. These are:
  - 1 - Administration for Parks and Facilities provided by the Operations, Parks and Facilities Clerk. This includes:
    - Public Works Service Requests capture from public calls/complaints, Temporary Road/Occupancy permits, Vehicle GPS oversight, Traffic lights confirmation, RFP queries
    - Facility Rental: inquiries, booking, site visits, payments, community event insurance for CDRC, CDRC Recreational guide
  - 2 - Special Events in the Town
    - There are many Shelburne events and festivals throughout the year requiring varying levels of support by the Development and Operations team. Preparation, inspection/maintenance, and post-event clean-up of park venues, streets, and facilities are assigned duties to the team. In recent years, while under the pandemic restrictions of Covid-19, these were somewhat diminished. However, as restrictions ease, there has been a heightened requirement to resume these activities as early as this year. Examples of such events from past years have included:
      - Easter Event, Farmer's Market opens, Street Festival, Canada Day Celebration, Pickin in the Park, Fiddleville, Shelburne Fall Fair
      - Remembrance Day and Downtown Christmas Decorations
  - Cemetery Operations and Services
    - Cemetery related activity/service is delivered by the Development and Operations team. Cemetery services are primarily delivered through a seasonal contracted individual. These activities include:
      - Seasonal opening and closing of the Cemetery
      - Cemetery grass cutting and maintenance
      - Spring burials
      - Seasonal burials

# Primary Activities

## Primary Activities

*The Development and Operations team includes Operations staff are also responsible for parks and recreational activities, special events, and cemetery operations.*

### Parks Activities (continued):

- 3 - Cemetery
  - This activity is provided by the Development and Operations team via a seasonal contracted individual. This includes:
    - Seasonal opening and closing of the Cemetery
    - Cemetery grass cutting, maintenance, and staffing – May 1<sup>st</sup> to November 1<sup>st</sup>
    - Internments occur between May 1<sup>st</sup> and November 1<sup>st</sup> – outside of these dates the mortuary is used until internment the following Spring
    - Cemetery operations are guided by Town of Shelburne By-Law 39-2019 Maintain, Manage, Regulate and Control the Shelburne Cemetery
  - The Shelburne Cemetery is a 21.83-acre property owned and operated by the Town of Shelburne. The cemetery is divided into 25 open Wards currently, with most new internments going to 3 Wards where there are approximately 998 burial plots, 151 cremation and 53 niches available. There are 6 more Wards that are currently open fields within the cemetery that are available to be developed and opened in the future for almost 3000 additional plots.
  - Over the past four years, the full burials have ranged from a low of 13 to a high of 27. Cremations have ranged from 18 to 30.
  - Based on these figures, there is little need to look for expansion beyond future planning for the development of the fields of the identified Wards within the cemetery property.
  - Annually, the Town contracts an arborist to assess the trees in the Cemetery to provide recommendations as to trimming, preservation, and replacement
    - The work that is provided is managed within the yearly budget
  - As future expansion is determined, the fields of the six planned Wards will require leveling, road pathways, and landscaping. There are few trees currently within these Wards, with any tree cover at the peripheries.
  - All additional plots, cremation plots, and Columbarium niches require advance registration and approval by the Registrar appointed for under the Funeral, Burial and Cremation Services Act on behalf of the Ministry of Government and Consumer Services.

# Primary Activities

## Primary Activities

*The Utilities Team is responsible for the Towns water/wastewater assets outside of the treatment plant.*

### Activities

#### Utility Network:

- The responsibility for the maintenance of the street-wide network for the supply of water, and sanitary and storm sewers are with a 3-person team (supervisor, two utility operators) within the Development and Operations team. OCWA operates and maintains the water and wastewater treatment facilities.
- The Utilities Supervisor and 2 Utility Operators/Labourers, plus the Utilities coordinator (from the Financial Services / Treasurer Department) maintain:
  - 50.3 kms of water distribution mains, 254 hydrants, 77 network structures, 338 valves, and 2,054 service lines
  - 36.6 kms of wastewater mains (35.3 kms are gravity mains), 62 network structures, and 1,704 service lines
  - 32.8 kms of stormwater mains, 719 catch basins, 18 discharge points, 8 network structures, and 944 service lines.
- The key performance indicators are monitored for reporting reliability, safety, availability and responsiveness of the system. There are established targets for no water breaks, zero wastewater backups or emergency repairs to wastewater infrastructure, and no events of pond overflow or collection main failure events resulting in downstream flooding or stormwater backups.

#### Activities:

- Activities are a combination of routine and/or scheduled events, water meter services, service requests/repairs, and utility locates.
  - Scheduled events include Lift station inspections for flow and test of alarms, cleaning and painting, hydrant flushing, water tower inspections
  - Water meter services include assembly of the meter by the utilities team, delivery to home builders/contractors for installation, inspection of meter connection prior to service, review of high usage locations, meter replacements
  - Service Requests/Repairs include checking catch basins for blockages, curb and catch basin repairs, backups and water main breaks, storm and sewer main maintenance, camera inspections of back-ups on resident properties, bulk water filling, responding to system alarms
  - Locates are required when excavating to install fences, repair driveways, plant trees, etc. Locates are more active during construction season.
- Administratively, the following activities are primarily handled by the Utilities coordinator:
  - Bi-monthly water and sewer billing
  - Inquiries, investigate questionable billing/usage, reconcile month-end billings/receivables/payables with Town General Ledger, match revenue with clearing account
  - Customer receivables/collections/disconnects, as well as payment plans

# Primary Activities

## Primary Activities

*The Town's Development and Operations staff have had considerable involvement in many capital projects completed by the Town.*

### Activities

- In addition to the operational activities of the Development and Operations Department, staff are involved in various capital projects to support the Town. Stakeholders indicated that these activities have been increasing in recent years. Involvement in capital projects would be in addition to the scheduled and regular operational activities completed by the Department.
  - Examples of these include the development of the Town's Dog Park; tennis/pickleball court; community garden; and splash pad at Greenwood Park. Staff involvement has ranged from general labour/construction to beautification projects to general contractor/project management.
- In some cases, Town staff involvement in capital projects may represent good value and utilization of Town resources. However, a heavy reliance on Town staff to complete capital projects has implications which include a likely reduction in service levels provided to ongoing operations. Additional, Development Charges allocated to capital projects generally cannot be used to offset operational staff time, whereas they can be used to fund third-party contractors. Further analysis of staff time is required to fully understand the scope of involvement in capital projects and impact on other operational requirements.

# Structure of Team

## Team Structure

*The current structure of the Development and Operations Team differentiates utilities and operations staff; but does not identify specific parks/recreation operators.*

### Findings & Observations

#### Development and Operations Organization

- The Development and Operations Department includes a Director, Manager of Operations, Parks & facilities; and two Supervisors (Operations and Utility)
  - This structure effectively results in two work groups –
    - Operations and Parks, which includes the Manager of Operations, Parks & Facilities; Supervisor Operations; and operators, labourers, clerk
    - Utilities, which includes a supervisor and two operator/labourer staff.
      - OCWA provides third-party management and operation of the Town’s water/wastewater treatment facilities
  - The Manager of Operations, Parks & Facilities, supervisor and staff have responsibilities for Roads and Winter Control activities; waste and leaf collection/Town appearance; special event support; and parks and recreation activities
    - See proceeding section for detailed description of activities

#### Operations staff are not differentiated between Parks and Roads, nor are job activities or hours of operation

- The current structure of the team results in roles and responsibilities for Operation staff that blend traditional “parks” and “roads” activities.
  - For example, staff job descriptions have both parks and roads activities; hours of operation also emphasizes traditional public works/roads hours and do not fully reflect park and recreation utilization (i.e., requirements for evening and weekend working hours).
  - There is also no differentiation for Utility Labourers, despite unique working environments; job duties; and training/qualifications.

### Implications

- Structure of the Operations team does not support the scaling up of parks and recreation services (should the Town decide to continue adding services), or does it easily facilitate future planning for Roads or Parks and Recreation activities.
- Structure of the Operations team may not support/align to resident expectations with respect to the timing of service delivery, particularly related to parks and recreation services (i.e., without the need for overtime or hours scheduled outside of normal schedule).
- With tasks for staff balanced between Roads and Parks activities, team members are often moved from one activity to another which can impact the concentrated efforts / skill requirements expected from the differing activities.



# Structure of Team

## Team Structure

*Within the Operations team of the Development and Operations group (i.e. excluding utilities) an estimated 25%-35% of staff effort is allocated to Parks activities.*

## Findings & Observations

### Development and Operations – increasing focus on Parks and Recreation

- The Development and Operations Department consists of:
  - 1 FT Director
  - 1 FT Manager of Operations, Parks, and facilities
    - 1 FT Operations Supervisor
      - 6 FT Operator/Labourers
      - 4 Winter Seasonal Contracts
      - 5 Summer Seasonal Contracts
      - Summer Students (18 week contract)
    - 1 FT Operations, Parks, and facilities Clerk
    - Custodial Services Attendant
    - 1 FT Utilities Supervisor
      - 2 FT Utilities Operator/Labourer
- The team is provided support by the FT Utility Coordinator and the FT GIS Coordinator from the Financial Services Department
- As of this draft, the Project Review team is still exploring whether timesheet level data is available for the Development and Operations team. This analysis would support an enhanced understanding of the time spent/utilization of staff across activities defined as: Parks and Recreation; Roads and Public Works; Special Events, and Utilities. As a proxy analysis to support this, the team has reviewed labour expenses identified in the Town’s annual budget to determine level of effort at these activities. Preliminary analysis suggests that within the “Operations” team of the Development and Operations Division (i.e., not including Utilities staff); the division of labour costs is approximately 25%-35% to Parks and Recreation (Parks Labour and Cemetery Labour), with 65%-75% allocated to Roads and Public Works (Works Admin Labour and Works Winter Control Labour).
  - Of note, the ratio of Works/Winter Control labour to Parks/Cemetery Labour has been increasing in favour of Parks in recent years. In 2020, approximately 25% of labour costs were allocated to Parks/Cemetery, compared to an approved budget of 35% in 2022.

## Implications

- The increasing allocation of labour costs towards Parks activities, when viewed with relatively stable staffing levels in the Operations team suggests that more time/staff focus is being directed to Parks and Recreation activities than in recent years. Given the stable staffing levels, this may suggest a reduction in time/focus spent on other Roads/Public works activities. This is in alignment with findings described above regarding increased involvement in parks and recreation activities for this team.
- Additional analysis on timesheet level data would allow for further conclusions to be drawn – including an analysis of the seasonal shift between activities.

# Structure of Team

## Team Structure

*The Director of Development and Operations has a large scope of responsibilities with work volumes (largely as a result of Town growth) that make it difficult to effectively provide direction in all areas.*

## Findings & Observations

### Workload and Scope of Responsibilities for Development and Operations Director

- As noted on the previous slides, the Department has a FT Director who reports to the Town's CAO. The Director is responsible for overseeing Parks and Recreation activities; Public Works (road, street lighting and signage, etc.), utilities (water/waste water delivery and oversight of OCWA contract); and development activities.
- Given the growth rate of the Town, this is a large portfolio of activities for a single Director.
  - The Town's Parks and Recreation Master Plan will identify new activities and requirements for the Department to action
  - The Department is involved \$26M-\$34M Water Pollution Control Plan (WPCP) project
    - Project Cost Estimates per 2022 Adopted Budget
  - The volume of permit applications and necessary review is expected to increase as an additional 300+ homes in the Fieldgate development come online. The County MCR has stated growth targets which are anticipated to result in sustained development pressures for the Town
- Recently, to provide support to the Director, the Manager of Operations Parks & Facilities has been 'informally' reporting to the CAO.

## Implications

- The Town has reached a size and level of activity in service delivery where it has become every difficult/inefficient for a single resource to have oversight of public works, infrastructure, parks, recreation, and community services.

# Structure of Team

## Team Structure

*There is currently no formal role or process in place for supporting the large scope of responsibilities and workload of the Supervisor during vacations, absences, etc.*

### Findings & Observations

#### Scope of Responsibilities Supporting Operations Supervisor

- The Operations Team currently does not formally have staff or processes in place to support the responsibilities and workload of the Supervisor. As a result, the Operations Supervisor has a large scope of responsibilities without a primary support/backup staff member. This causes concern when the Supervisor has scheduled time off or is unavailable. There is a requirement to have the right mechanisms in place so that the role can be shared when needed e.g., appropriately trained and knowledgeable staff can continue activities during vacations and absences.
- Additionally, it is not currently clear that the Operations Team has the capacity to provide this support to the Operations Supervisor. In other words, there is likely a need for an additional one or more staff to allow the Operations Team to support these responsibilities with training appropriately provided for planning work schedules for the team, project planning, and budget input.

### Implications

- The Town may need to formalize a role to support the Operations Supervisor, however unless the Operations Team has the resource (staff) levels to provide this support, it is not clear that effective support would be achievable.



# Town of Shelburne

Review of Development and  
Operations Department

Future State Report

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December 13, 2022



*A People Place, A Change of Pace*  
**SHELBURNE**  
ONTARIO, CANADA



## Review of Development and Operations Department

→ Future State Report

## → Contents

1. Project Overview
2. Current State Summary
3. Future State Opportunities and Recommendations
4. Appendix
  - Detailed Current State Findings

December 13, 2022



→ Review of Development and  
Operations Department

## 1. Project Overview

# Context of the Review

*This Review of the Development & Operations Department represents a follow-through on recent Service Delivery Review Recommendations to enhance the delivery of Town services and improve operational efficiencies.*

- In the Fall 2021, the Town of Shelburne completed a Service Delivery Review (SDR) that involved a review of service delivery across the Town. A key recommendation from that report was to:
  - *Conduct an Operational Review of the Development & Operations Department (Recommendation DEV1). The 2021 Fall SDR also included a recommendation to Separate Parks and Recreation Function from Public Works (Recommendation DEV2).*

Opportunity Area	Improvement Opportunity	Rationale	Dept. Impacted
B Development & Operations (DEV)	DEV1: Conduct an Operational Review of the Development & Operations Department	Conduct full Operational Review with focus on key activities associated with Public Works, Utilities, and Parks/Recreation activities. Including: KPIs, Staffing Levels, Staffing Practices, Use of technology, Roles and Responsibilities across PW, Parks, Utilities; Equipment / Fleet Management and asset management planning	Development & Operations CAO's Office
	DEV2: Separate Parks and Recreation Function from Public Works	To support increasing demand/focus on Parks and Recreation; to support potential incorporation of CDRC into Town operations	Development & Operations CAO's Office
		Consideration should also be given to increasing staff capacity to support outdoor events/coordination.	

## Recommendations DEV1 and DEV2 from the November 2021 Service Delivery Review completed for the Town of Shelburne

- Following the completion of the 2021 SDR, the Town applied for grant funding from Ministry of Municipal Affairs and Housing as part of the Municipal Modernization Fund (MMF). This application was successful, and the funding allocated to conduct the Review of the Development & Operations Department. This report represents the findings from this review, and costs have been covered by the grant received by the Town of Shelburne.

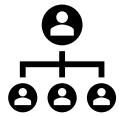
*Note1: This review is focused on services operated by the Town. Specifically, operations of the Centre Dufferin Recreation Complex (CRDC) are not included in this review. In 2020 an SDR completed for the County of Dufferin and member Municipalities included recommendations related to the dissolution of the boards of management within the scope of the review (Fire and Indoor Recreation Services). That SDR recommended that these service areas would be directly delivered by the Town of Shelburne as well a set of recommendations to incorporate Centre Dufferin Recreation Complex (CDRC) as a part of the Town's strategic priorities. The original scope of the SDR considered exploring the impact of the dissolution of the boards of management. However, as consultations between the Town of Shelburne and neighbouring municipalities currently involved in both Boards of Management are ongoing, detailed planning considerations were not included in this review. Rather, the review has considered the possibly that these services may become a Town-delivered service in the future (as opposed to recommendations based on an agreed upon timeline or MOU for service delivery).*

# Project Context



In the fall of 2021, the Town of Shelburne (“Town”) completed a **Service Delivery Review** that examined the organizational structure, staffing and services provided by the Corporation. That review highlighted the opportunity to examine the current Development and Operations department in greater detail.

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The **Development and Operations Department** has been providing a greater level and diversity of services as a result of the Town’s continued growth. This includes activities associated with public works, roads, and utilities as new developments have been built, as well as a greater focus on parks and recreational activities.

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Optimus SBR was contracted to lead the **operations review to explore opportunities related to improving the efficiency of the department**, with the overall goal of supporting the department’s ability to make proactive, evidence informed decisions and effectively deliver the services expected by Town residents.

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# Project Mission and Success

## → Project Mission

- To conduct a review of the Town of Shelburne's Development and Operations Department to ensure the department is positioned to support the Town's continued growth and a greater level and diversity of services expectations.
- This includes operational activities associated with public works, roads, and utilities as new developments have been built, as well as a greater focus on parks and recreational activities.

## → Project Success

- Establish recommended service levels or performance mechanisms (metrics, KPIs etc) to guide decisions, investments and process in level of services to be provided to residents
- Greater confidence in the ability to move from a reactionary approach to services to a more data driven approach to how services are scheduled, managed and delivered.
- Enhanced alignment between how work is managed and emerging priorities
- Clarity around problem areas and their underlying causes related to the delivery of services within the Department

# Project Mission and Success

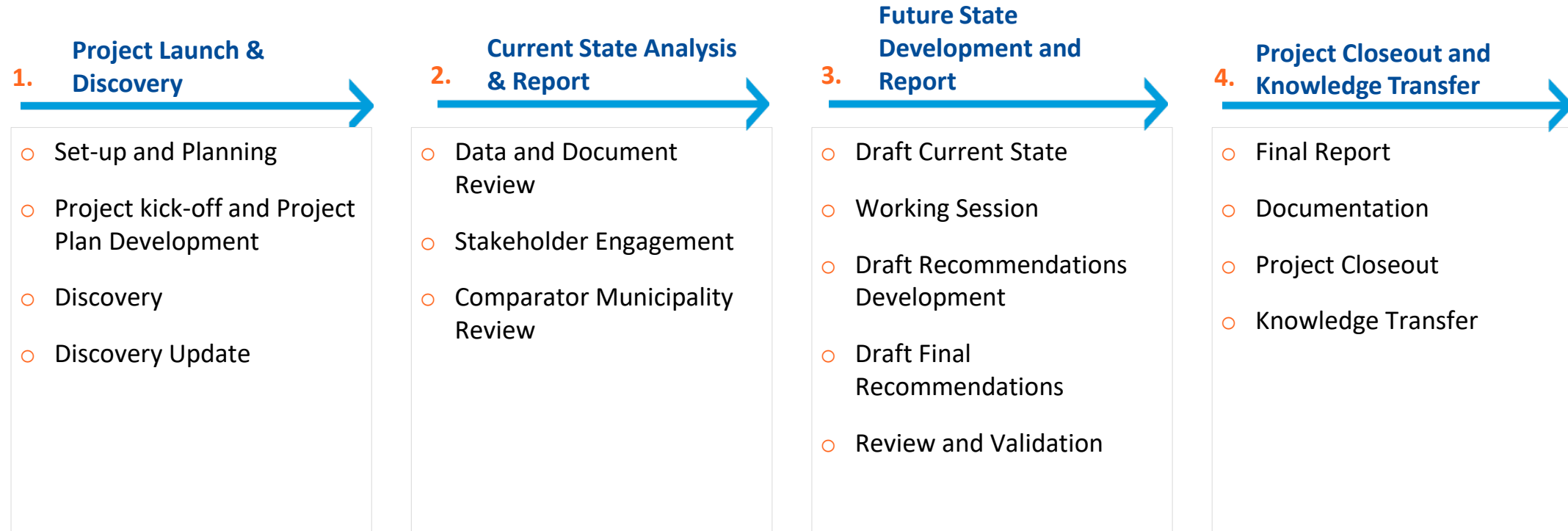
## → In Scope

- ✓ Operational review with a focus on key activities associated with public works, roads, utilities, and parks, trails and recreation activities, including:
  - Roles and responsibilities across the Department,
  - Staffing levels and staffing practices
  - KPIs and use of data and reports
  - Use of technology
  - Fleet management and asset management planning
- ✓ Discovery Interviews and Stakeholder Engagement
- ✓ Comparator Municipality Review
- ✓ Current State Assessment
- ✓ Recommendations Development
- ✓ Final Report

## → Out of Scope

- x Communication and Change Management Support
- x Public consultations
- x Review of CDRC Operations

# Project Approach



## Deliverables

- Project Plan
- Draft Engagement Plan

- Stakeholder Engagement Process
- Current State Report

- Draft Recommendations
- Draft Final Report

- Final Report
- Final Presentation
- Knowledge Transfer



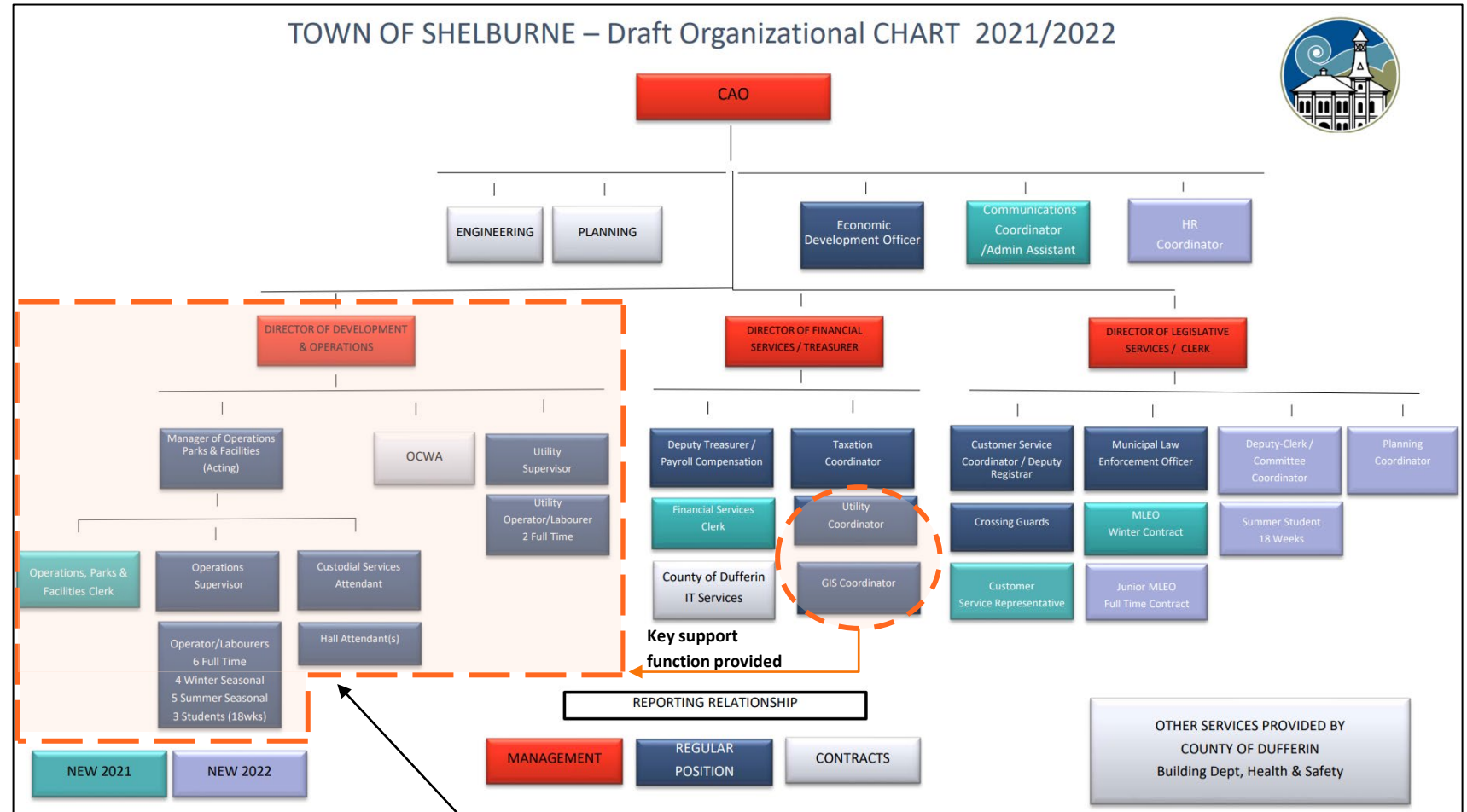
→ Review of Development and  
Operations Department

## 2. Current State Summary

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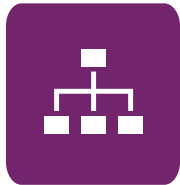
# Section Introduction

- The review has focused on the Development and Operations Department. Where support functions are provided by Town staff in other areas, these staff have been engaged in the review.
- Note that activities completed by OCWA have not been a focus of this review, as these were covered in-depth in the Fall 2021 Service Delivery Review regarding the use of third-party vendors for the Town.



## Focus Areas

The focus of this review has been on the following areas: Structure and Staffing, Processes and Service Delivery, and Service KPIs and Communications for the Department.



### Structure and Staffing

- Increased pressure on staff to switch responsibilities between Public Works and Parks and Recreation operations.
- Recognition of the differing requirements of Public Works functions and those of Parks and Recreation.
- Need for clear definition of roles and responsibilities in a new structure where the two functions are separated.
- Clarity is required on staffing levels associated with Public Works and Recreation services and summer to winter activities.



### Processes and Service Delivery

- Possible requirement for additional equipment to meet increased demands from a growing population.
- Increased efficiencies resulting from the implementation of the GIS/Workorder system – opportunities to further leverage.
- Several of the Department's staff working overtime due to increased responsibilities coupled with recruitment challenges in hiring new staff.
- Increased use of online systems particularly during COVID-19 pandemic.



### Service KPIs and Communications

- General satisfaction overall with the level of responsiveness and interaction with the Department staff and the services provided (based on Council consults, for this review and previous SDR work).
- Increased emphasis on adding new services/facilities - dog parks, cricket fields, tennis grounds, splash pad etc.
- Need for organized provision of services by the staff during non-traditional hours such as the evenings when most parks and recreational facilities are used.
- Need for a more formal system of work orders.
- Absence of an allocation policy and fee considerations for facility utilization.

# Theming of Key Findings and Observations

Key findings from the current state review have been themed into 6 categories. These findings support the recommendations developed to address each of the focus areas for the review.

Finding Category	Description of Theme
Primary Activities	<ul style="list-style-type: none"> <li>General observations and description of the scope of tasks and activities completed by the Development and Operations Department – these are specific to activities related to road and winter maintenance, Town operations, parks and recreation, and special events.</li> <li>These findings provide insights into the volume of work completed across the team.</li> </ul>
Team Structure	<ul style="list-style-type: none"> <li>Observations and findings related to how the Development and Operations team is organized to deliver required services.</li> <li>This includes the organization of the Development and Operations Department; roles and responsibility; and internal team communications and human resources.</li> </ul>
Team Processes and Workflows	<ul style="list-style-type: none"> <li>Observations and findings related to how the Development and Operations team completes key activities.</li> <li>These findings provide insights into potential opportunities for process and workflow efficiencies for the team.</li> </ul>
Equipment, Tools, Technology, Vehicles, and Facilities	<ul style="list-style-type: none"> <li>Findings related to the impact that technology, systems, equipment, tools and facilities used by the Development and Operations team has on the efficient and effective completion of required activities.</li> </ul>
Communications, KPIs, and Outcomes	<ul style="list-style-type: none"> <li>Findings related to external communication regarding the Development and Operations Department activities and the monitoring of service standards or Key Performance Indicators (KPIs).</li> </ul>
Overarching Engagement with HR	<ul style="list-style-type: none"> <li>Findings related to overarching HR concerns that can be attributed to all Departments and not necessarily attributable to the Development and Operations Department on its own.</li> </ul>

→ Key findings will support the development of recommendations related to the focus areas of the review



Structure and Staffing



Services



Processes

# Key Themes and Findings

## Primary Activities

The Development and Operations Department is responsible for a range of activities including managing the Town's road network, general works, parks and recreational activities, special events, cemetery operations, utilities, and capital projects.

- The Development and Operations team includes Operations staff that are responsible for the Town's **large road network and general public works activities**. There are extensive summer activities to be completed ranging from road and sidewalk repairs, resurfacing and gravelling, repainting pavement markings, maintenance, sweeping, dust control and culvert replacement. Snow plowing/clearing is the major winter activity.
- The team is also responsible for **parks and recreational activities, special events, and cemetery operations**. This includes managing sporting facilities, public trails, and attached facilities such as washrooms. Importantly, the operations of Centre Dufferin Recreational Complex, operated through a Board of Management with representation from the Towns of Shelburne and Mono, and the Townships of Amaranth and Melancthon, are not part of the Development and Operations team. Special events require varying levels of support by the Department, with **increased support anticipated as COVID-19 restrictions ease and special events resume**.
- Cemetery activities are overseen by the Department through a seasonal contracted individual.
- Within the Department, the Utilities Supervisor and Utility Operators oversee the maintenance of the street-wide network for the **supply of water, and sanitary and storm sewers** while OCWA is contracted to operate and maintain the water and wastewater treatment facilities. Activities include a combination of routine and/or scheduled events, water meter services, service requests/repairs and utility locates. A Utility Coordinator manages administrative tasks such as water and sewer billing; inquiries; payment plans, etc.
- In addition to the operational activities of the Department, **the staff are also involved in various capital projects** to support the Town. Stakeholders noted an increase in these activities in recent years. Involvement in capital projects is in addition to the scheduled and regular operational activities completed by the Department. A heavy reliance on Town staff to complete capital projects has implications which include a likely reduction in service levels provided to ongoing operations.



# Key Themes and Findings

## Team Structure

The current structure of the Development and Operations Team differentiates utilities and operations staff; but does not identify specific parks/recreation operators. Further, there is no formal role or in place for supporting the large scope of responsibilities and workload of the Supervisor during vacations or absences.

- The current organizational structure of the Department includes a Director, Manager of Operations, Parks and Facilities, and two Supervisors (Operations and Utility). **This structure effectively results in two work groups:**
  - **Operations and Parks** (including Manager of Operations, Parks & Facilities; Supervisor Operations; and operators, labourers, clerk)
  - **Utilities** (including Supervisor and two operator staff)
- Operations staff are not differentiated between Parks and Roads, nor are job activities or hours of operation. An analysis of labour expenses identified in the Town's annual budget revealed that **within the Operations team of the Development and Operations group (i.e., excluding utilities) an estimated 25%-35% of staff effort is allocated to Parks activities.** To elaborate, staff job descriptions have both parks and roads activities; hours of operation also emphasizes traditional public works/roads hours and do not fully reflect parks and recreation utilization.
- As a result, **the structure of the Operations team does not support the scaling up of parks and recreation services nor does it easily facilitate future planning for Roads or Parks and Recreation activities.** The structure may also not support resident expectations with respect to the timing of service delivery, particularly related to parks and recreation services (i.e., without the need for overtime or hours scheduled outside of normal schedule). With tasks for staff balanced between Roads and Parks activities, **team members are often moved from one activity to another which can impact the concentrated efforts / skill requirements** expected from the differing activities.
- The Development and Operations Director has a large scope of responsibilities. Given Development pressures that the Town has (and continues to) respond to, their workload is very high and there is a need to monitor the need for expanded administrative support.
- Lastly, there is currently no formal role or process in place for supporting the large scope of responsibilities and workload of the Supervisor during vacations, absences, etc. This is a cause of concern as there is no backup staff to ensure operations runs smoothly in the absence of the Supervisor.

# Key Themes and Findings

## Team Processes and Workflows

The Town has made various advancements in utilization of digital tools such as Citywide to support processes. However, there is still a significant presence of paper-based processes such as the manual entry of timesheets which increases processes inefficiencies within the department.

- The recent **implementation of Citywide into operations has generally been viewed as positive** owing to its ability to **support electronic workflows** for service requests and work orders for the team. This has resulted in reduced paper requirements within the Department, providing a formal mechanism for responding to resident inquiries, **enhancing processing speed of work orders** and allowing for electronic reporting of activities.
- In terms of resident inquiries, there is a **coordinated point of access for resident concerns through the Town's website and phone calls answered** by the Operations, Parks, and Facilities Clerk. The Citywide System also enables the team to prioritize actions and track activity and trends as well as provide residents with follow-up information when needed.
- Currently, the Department staff **completes paper timesheets by hand** which are then reviewed by the Supervisor and entered into the Town's financial system for payroll purposes. The existing paper-based timesheet records limits the ability to conduct analysis of staff utilization across the Department's activities easily or in real-time.
- **Utility locates – an activity described as very reactive based on customer requests – represents a significant time requirement for utility staff.** Further, the process of providing bulk water fills as a service requires the use of a backflow prevention which in turn requires inspection and testing to ensure it is operating correctly. Currently, **device inspections mainly happen on an annual basis instead of each time the device is used.**
- Occupancy permits are not shared from the County's planning / building group, which proves challenging for the Utility Coordinator to continually check whether a property is active, and billing should be enabled, with the current amount of new development in the area.
- The Town is continuing with pre-Covid plans to sell the 420 Victoria Street facility. Some equipment stored at 420 Victoria to enable physical distancing of staff is being relocated to 124 Luxton Way. Material for surface application (i.e., sand) is also stored at both locations for use in winter months. With the anticipated sale of the 420 Victoria location, the trackless sidewalk tractors will need to be relocated most likely to the 124 Luxton Way yard. This will increase the travel distance requirements for servicing northern areas of the Town and increase **time spent in road and sidewalk clearing activities** during the winter months when staff are traveling from the northern parts of the Town to the Luxton Way Yard.

# Key Themes and Findings

## Team Processes and Workflows

The absence of important policies within the Department such as a policy for non-monetary donations and a Fields Allocation Policy, coupled with gaps in service standards related to winter maintenance in parks, often result in staff making 'judgement calls' on how not manage activities.

- Grass cutting is typically logged via manual entries in paper binders in fields. These **binders are subject to weather conditions which in turn can result in damaged and/or lost records of key activities in the Parks**. Grass cutting of roughly 98 acres, represents the largest staffing requirement for summer months. The current schedule for regular grass cuts for Town property is not based on service standards not is performance against this schedule reported on a regular basis.
- In comparison to the soccer fields that are maintained by the staff and in certain cases, a vendor, (e.g., the Greenwood Park soccer fields), maintenance of the planned **cricket field is a more resource-intensive and costly endeavor**. Overall, these fields require additional rolling, seeding and cutting.
- There also appear to be **gaps in service standards related to tree trimming/maintenance and winter maintenance in parks**. The absence of these standards has resulted in some situations where Operations staff are required to make 'judgement calls' on activities in response to resident complaints. It may also lead to difficult situations for staff when communicating with residents without a formal service standard in place to assess specific situations. The Town utilizes the professional services of an arborist for assessment of tree damage, pruning/replacement, and assistance with dealing with insurance and liability with respect to sensitive resident issues. Planning issues maintaining the tree canopy, whether affected by construction, utility requirements, storm damage, or invasive disease are not currently guided by Town standards.
- The **absence of a policy for non-monetary donations** to the Town proves challenging as donations must be planned and accepted in ways that do not place unnecessary burden on long-term sustainability. Additionally, the **Town does not have a Fields Allocation Policy** that are typically used to manage the demand and supply of municipal facilities, resulting in challenges in allocating use of park facilities and prioritization of user groups.
- While residents can book facilities online, the **Town does not have a dedicated recreation management tool to support the end-to-end booking management process**. This results in the need for manual processes within the existing online system (e.g., manually updating calendars to reflect revised availability).

# Key Themes and Findings

## Equipment, Tools, Technology, Vehicles, and Facilities

Logistically, the Town is continuing pre-Covid plans to consolidate operations in the Luxton Way yard, with consideration being given to space expansion. Technologically, the Town is moving in the direction of adopting value-add technology to reduce manual and paper-based processes.

- **Since the COVID-19 pandemic, the Department has worked out of two primary locations to maintain physical distancing protocol.** The 420 Victoria Road location has been used primarily by the Utility team for storage and as a workspace. **Pre-pandemic plans to sell the 420 Victoria Road location are currently underway and has resulted in the Utility team being relocated to the 124 Luxton Way** facility for shared use of the workspace. There are plans in place to expand the 124 Luxton Way facility for more service bays to better accommodate the entire Development and Operations Team. Staff indicated that additional facilities across the Town are also being used to store equipment and supplies including Hyland Park, the Water Tower, and the Shelburne LTC.
- However, based on observations and discussions with staff and leadership, **the Development and Operations team will require more space than is provided by the current Luxton Way facility.** Currently, the facility does not have enough indoor storage space for all winter control equipment which may result in a need to store equipment outdoors, potentially impacting the time/speed required to ready vehicles in winter conductions. Further, the Utility team is required to carry water meter equipment up and down staircases on a regular basis which may pose a fall/trip hazard. Staff/leadership noted plans to expand this facility and provide additional space for staff breaks at other locations across the Town.
- On the technology front, **additional advancements in utilizing technology by the Town include the adoption of GPS tracking tools for winter control vehicles** which helps to ensure the Town is tracking performance against Minimum Maintenance Standards and can be used to generate reports on activity if required.
- Additional **examples of software and services used by Department include:**
  - **Citywide** is used for Asset Management and includes facilities, fleet, equipment with varying levels of detail
  - **Citywide** is also used for Work Orders. Utilities and facility bookings are currently completed through Keystone. Initial planning is underway to transition additional processes for utilities to Citywide
  - **ESRI Arch GIS** is licensed through Dufferin County
  - **Tallysman** software from Five9 Solutions is used for the GPS monitoring of winter control vehicles
  - **Traffic Logix** equipment is used for traffic calming applications.

# Key Themes and Findings

## Communications, KPIs, and Outcomes

The Town should continue to direct inquires, complaints, and requests to formal customer service channels and support a high-degree of understanding regarding operations among Members of Council. In terms of KPIs, there is limited use of indicators or data to support performance or ongoing decision making.

- From a Communications lens, the **Town maintains an FAQ guide on its website**, which along with the Department specific webpage provides a good level of information on key activities completed by the Town. However, **the FAQ page is not currently linked from the “submit complaint” online form** which often results in **resident misunderstanding** and in turn, results in complaints. There is also not a clear process for reviewing trends in resident complaints/inquires that could be addressed through the Town’s website as enhancements to the FAQ page.\*
- **Complaints are also made to Members of Council** directly by residents and businesses. While these should be directed to the Town’s official processes and channels, members of Council also have an opportunity to support resident education regarding Town processes and standards. However, **Council may not currently be provided with the tools and key speaking points to help educate residents on issues** related to services provided by the Town.
- Lastly, there **limited examples of KPIs or service standards in place across activities completed by the Department** such as activities related to roads, utilities, parks and recreation. The notable exception is the monitoring of winter maintenance activities against Ontario’s minimum maintenance road standards; and indicators related to the Town’s Asset Management Plan for Bridges, Culverts, Roads, Stormwater, Wastewater, Water to meet requirements associated with Ontario Regulation 588/17.
- Without the collection and tracking of KPIs, **the Town is also not currently able to report with certainty on activities or performance of the Development and Operations Department**. Historically, the Town has likely been limited in the ability to efficiently collect and report on KPIs due to the reliance on manual and paper-based processes. However, the Town’s commitment to technology implementation (including Citywide) presents an opportunity to leverage enabling systems to establish reporting practices.

\*Note: During the course of this review, the Town updated it’s website to link the Compliant Page and FAQ Page. This was completed as a quick-win in fall 2022.

# Key Themes and Findings

## Overarching Engagement and HR

The Department staff have identified concerns with respect to the availability of HR support; policies and procedures governing compensation for staff have not been reviewed in a number of years and may not be aligned with practices in peer municipalities.

- A policy is in place for Operations staff related to on-call compensation that stipulates compensation for the staff assigned to carry standby phone at six (6) hours regular pay for each Saturday or Sunday. The policy provides standby compensation during the winter season for fulltime employees designated to be on call during the winter season at three (3) hours regular pay for each Saturday, Sunday or Statutory Holiday. Importantly, this is not applicable to contract employees.\*
- In terms of HR and Performance Reviews, some staff reported confusion with regards to the appraisals process. Staff reported limited avenues to receive formal feedback on performance. Leadership emphasized the need to clarify the difference between compensation considerations and performance reviews and identified that this could be made more formal. Staff also appear to be unaware of their designated contact for HR related matters. The findings are aligned with the general findings from the Fall 2021 SDR Report for the Town of Shelburne which identified capacity limitations to the Town's existing HR capacity and recommended an HR Coordinator Role. It is understood that this role has been approved with an October 2022 start date.
- The Department also works with staff that operate out of Town Hall to support processes such as utility billing and GIS. However, not all of these staff report into the team. While the leadership is making effort to ensure the team remains updated on new developments, some challenges exist. For instance, not all staff have a Town email account, resulting in the need to provide updates via verbal or posted notice as well, weekly update Zoom calls set up during the pandemic have been replaced by less frequent sessions.
- Further, there is limited orientation for new hires to support their further understanding of the group's operations, workflows, and processes (current formal onboarding process for new hires is principally for the health and safety requirements of the position).

\*The Town is currently conducting a compensation market review (the Ward and Uptigrove Report) which will address issues noted in staff interviews including: The Standby Compensation Policy, Shift Premiums, wage premiums for specific technical qualifications or certifications held by staff, and Standby and On Call Policy.



→ Review of Development and  
Operations Department

### 3. Future State Opportunities & Recommendations

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→ Review of Development and  
Operations Department

Review of Development and  
Operations Department

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Opportunities for Improvement



# Section Introduction and Context

The opportunities and recommendations developed aim to promote greater effectiveness and efficiency in the running of the Development and Operations Department and consequently the delivery of services to a growing population.

- The recommendations that have been developed for the Development and Operations Department should be seen as responding to the needs of the growing community by positioning the Department to deliver high quality services to residents, businesses, and internal stakeholders.
- At the same time, the recommendations aim to support greater internal efficiency among the Department staff in managing their respective responsibilities and delivering services in an effective manner.
- **The Recommendations are based on the three focus areas of the review:**



**Structure and Staffing:** Understanding the optimal structure for providing services currently delivered by the Department and approximate staffing levels/requirements for Operations (Public Works, Utilities) and Parks and Recreation activities.



**Processes and Service Delivery:** Identifying the opportunities that exist for efficiencies in services provided by the department.



**Service KPIs and Communications:** Determining the measurements (KPIs) that should be in place for services provided by the Department and how these activities could be communicated to Council and residents.

- It is also important to note that not all recommendations may be implementable concurrently, and consideration will need to be given to the prioritization and sequencing of recommendations. Implementation and timeline considerations have been provided to support this.

# Key Opportunities

Opportunities for improvement related to the structure of the Department and the staffing:

Review Focus Alignment	Improvement Opportunity	Rationale
Structure and Staffing	<b>SS1: Revise Structure of Development and Operations Team</b>  <b>SS1a:</b> <i>Restructure Development and Operations Team to have teams assigned to the following service areas based on need: Utilities, Roads and Operations, and Parks and Recreation. Accordingly determine the staffing complement.</i>  <b>SS1b:</b> <i>Establish Supervisor backup for the Roads and Operations Team. This does not require hiring a 'net-new' individual but rather could consider placing additional responsibilities upon one more existing staff members.</i>  <b>SS1c:</b> <i>Establish new position for a Data Analyst to support collection, validation, and analysis of Labourer data related to scheduling, work activities and cost allocations.</i>	<p>Dedicated focus (prioritization of activities; schedule of staff; KPI tracking) for parks and recreation, roads/operations, and utilities</p> <p>Option could include three functions:</p> <ul style="list-style-type: none"> <li>▪ Development, Planning and Utilities (Engineering; OCWA)</li> <li>▪ Public Works/Operations (Roads, etc.)</li> <li>▪ Parks, Recreation, and Culture</li> </ul> <p>Ensure appropriate resourcing and support for the Development and Operations Team.</p>
		<p>Provide requirements for data (timesheet and work activities) collection, establish standards for data integrity and reporting, analyze data for opportunities to optimize labourer allocation across the service areas.</p>
	<b>SS2:</b> <i>Establish internal guidelines / commitments for team communications, updates</i>	<p>Improved communication and information sharing. Opportunity to enhance staff recognition; opportunity for reviews/refreshers on new policy or procedures, etc.</p>

# Key Opportunities

Opportunities for improvement related to the processes and service delivery within the Department:

Review Focus Alignment	Improvement Opportunity	Rationale
Processes and Service Delivery	<b>PSD1:</b> Clearly document the next phase of Citywide implementation and ensure accompanying staff training	Clear prioritization of next step investments/time requirements based on priority impacts
	<b>PSD2:</b> Revise time tracking requirements to collect information in greater detail on specific tasks and activities in all Development and Operations areas.	There is minimal data regarding Development and Operations activities that shows time spent and work efforts to support analysis of staff scheduling, utilization, and team capacity to deliver existing/ongoing operations and/or take on new projects.
	<b>PSD3:</b> Develop policies and procedures (process documentation) for Development and Operations Activities	Formal documentation of activities completed by the Development and Operations Team to support training and compliance
	<b>PSD4:</b> Develop a formal training and onboarding process for new hires in the Development and Operations Department	Enhanced new employee onboarding experience; reduce time for new staff to 'ramp-up' on operations processes and procedures
	<b>PSD5:</b> Investigate requirements regarding backflow prevention equipment to ensure good practice is followed	Clarity on compliance concerns; opportunity to ensure costs are recovered from customers
	<b>PSD6:</b> Explore opportunities to reduce staff time allocated to Water Meter kit assembly	Ability to redeploy staff to higher-value activities; reduced liability for damaged meters; reduced need for storage requirements.
	<b>PSD7:</b> Identify and assess options to support the pre-deployment of winter control surface and common road repair materials to central location(s) in Town; use existing Town facilities for staff break time.	Develop a decentralized approach to replenishing road materials (initially winter control surface materials), as well as providing the staff with lunch and break options that reduce the time spent traveling back and forth to the Luxton yard. This will reduce time requirements to complete existing winter control routes; improved service levels; potential for reduced fuel costs.

# Key Opportunities

Opportunities for improvement related to the processes and service delivery within the Department:

Review Focus Alignment	Improvement Opportunity	Rationale
Processes and Service Delivery	<b>PSD8:</b> Align Grass Cutting Operations to Service Level expectations for grass cutting across the Town. See Recommendation SKC02 for additional information on recommended KPI development and reporting.	Clarity on service expectations, requirements, and communication with residents and stakeholders; include existing sports fields and new facilities such as a permanent Cricket pitch; ability to better estimate service costs/value. This should be aligned to the involvement of the Data Analyst role (recommendation SS1c), as well as the analysis of time sheets and activities (Recommendation PSD2). This Recommendation is also aligned to Recommendation SKC2 - Develop KPIs for Development and Operations Activities
	<b>PSD10:</b> Review and revise contractor model for grass cutting across all needs of the Town following Service Level review (PSD8) above.	Review use of funds spent on third-party vendor; add Greenwood Park Soccer Fields to the Town's Grass Cutting routes (ending use of external vendor) with consolidation of grass cutting at Greenwood Park to Town staff; potential of using a vendor on other areas such as boulevards or large park areas
	<b>PSD10:</b> Develop and implement volunteer program for Parks and Recreation support	Potential to offset some costs associated with light park maintenance/upkeep for a limited time period; development community engagement opportunities
	<b>PSD11:</b> Review existing field rates, booking process, and corresponding contracts	Enhance customer experience when booking; ensure rates and fees reflect use of fields for all sports and activities; reduced staff time associated with finalizing facility booking
	<b>PSD12:</b> Develop and implement a non-monetary donations policy	Clarity surrounding communications with residents regarding non-monetary donations; ability to ensure alignment with the Town's strategic directions/the specific site plans related to the donation; formal consideration of ongoing liability assumed by the Town

# Key Opportunities

Opportunities for improvement related to service KPIs for the Department and Communications (internal and external):

Review Focus Alignment	Improvement Opportunity	Rationale
Service KPIs and Communications	<b>SKC1:</b> Enhance a Council Orientation Package and Process	Reduction in misinformation provided to residents; enhanced Council understanding of Development and Operations activities.
	<b>SKC2:</b> Develop KPIs for Development and Operations Activities	Ability to make evidence informed decisions on an ongoing basis; enhanced transparency to residents and Council

# Key Opportunities

Opportunities for improvements that were heard during sessions with staff which are related to Town-wide HR concerns:

Review Focus Alignment	Improvement Opportunity	Rationale
Human Resources – Town-Wide Opportunities	<b>HR1:</b> Determine action resulting from review of Compensation Policies and Levels for Development and Operations Staff	Ensure alignment with peer municipalities / good practice from the Compensation Market review; opportunity to address and respond directly to staff feedback and comments
	<b>HR2:</b> Refresh (as needed) and relaunch Formal Performance Reviews for the Development and Operations staff	Addresses identified gap in existing Development and Operations practices; better alignment with good practice for employee development; growth; and retention.
	<b>HR3:</b> Provide clear articulation of the support role that the new HR Coordinator will provide to staff	

# Key Opportunities Summary

Opportunity	Resource Requirements and Costs	Estimated Timelines (calendar year)
<b>SS1a:</b> Restructure Development and Operations Team to have teams assigned to the following service areas based on need: Utilities, Roads and Operations, and Parks and Recreation. Accordingly determine the staffing complement.	Addition of three (3) full-time staff beginning 2023. Estimated cost of \$200,000-\$250,000 per year, ongoing.	Q1 2023
<b>SS1b:</b> Establish Supervisor backup for the Roads and Operations Team. This does not require hiring a 'new-new' individual but rather could consider placing additional responsibilities upon one more existing staff members.	No additional resources required.	Q1 2023
<b>SS1c:</b> Establish new position for a Data Analyst to support collection, validation, and analysis of Labourer data related to scheduling, work activities and cost allocations.	Addition of one (1) full-time staff beginning 2023. Estimated cost of \$85,000.	Q1 2023
<b>SS2:</b> Establish internal guidelines / commitments for team communications, updates	No additional resources required.	Q2 2023 – Q4 2023
<b>PSD1:</b> Clearly document the next phase of Citywide implementation and Ensure accompanying staff training	No additional resources required for next phase plan.	Q1 2023 – Q3 2023
<b>PSD2:</b> Revise time tracking requirements to collect information in greater detail on specific tasks and activities in all Development and Operations areas.	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst new hire (Rec SS1c).
<b>PSD3:</b> Develop policies and procedures (process documentation) for Development and Operations Activities	No additional resources required.	Q1- 2023 – Q1 2024
<b>PSD4:</b> Develop a formal training and onboarding process for new hires in the Development and Operations Department	No additional resources required.	Q1- 2023 – Q1 2024
<b>PSD5:</b> Investigate requirements regarding backflow prevention equipment to ensure good practice is followed	No additional resources required.	Q1 2023
<b>PSD6:</b> Explore opportunities to reduce staff time allocated to Water Meter kit assembly	No additional resources required. Some Cost Savings anticipated.	Q1 2023
<b>PSD7:</b> Identify and assess options to support the pre-deployment of winter control surface and common road repair materials to central location(s) in Town; use existing Town facilities for staff break time.	Small costs associated with pre-deployment of materials (less than \$10,000). Some Cost Savings anticipated from reduced travel times (fuel costs, staff time)	Q4 2022 – Q1 2023
<b>PSD8:</b> Align Grass Cutting Operations to Service Level expectations for grass cutting across the Town.	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst new hire (Rec SS1c) and KIPs (SCK2).
<b>PSD9:</b> Review and revise contractor model for grass cutting across all needs of the Town following Service Level review (PSD8) above.	Cost savings anticipated in year one (less than \$10,000). Long-term costs/savings to be determined in cost-benefit analysis.	Q2 2023 – Q1 2024
<b>PSD10:</b> Develop and implement volunteer program for Parks and Recreation support	No additional resources required.	Q3 2023
<b>PSD11:</b> Review existing field rates, booking process, and corresponding contracts	No additional resources required.	Q2 2023
<b>PSD12:</b> Develop and implement a non-monetary donations policy	No additional resources required.	Q4 2023
<b>SKC1:</b> Enhance a Council Orientation Package and Process	No additional resources required.	Q2 2023
<b>SKC2:</b> Develop KPIs for Development and Operations Activities	Costs associated would be included in SS1c recommendation above.	Dependent on Data Analyst (Rec SS1c)



## Review of Development and Operations Department

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### Recommendations



# Recommendations – Structure & Staffing

## Current State Challenges

- There is no distinction between the Operations staff, and those responsible for Parks and Roads, nor between their job activities and hours of operation. Conclusively, the structure of the Operations team does not support the scaling up of parks and recreation services, nor does it easily facilitate future planning for Roads or Parks and Recreation activities.
- The structure may not align to resident expectations with respect to the timing of service delivery, particularly related to parks and recreation services. With tasks for staff balanced between Roads and Parks activities, team members are often moved from one activity to another which can impact the concentrated efforts/skill requirements expected from the differing activities.
- This is further exacerbated by an absence of a backup role to balance the large scope of responsibilities for the Supervisor, particularly during periods of vacation or absences.
- The lack of a resource to review and analyze timesheet data to maximize utilization, optimize scheduling, and reduce overtime.

## Proposed Recommendation

### SS1: Revise Structure of Development and Operations Team

- **SS1a:** Restructure Development and Operations Team to have teams assigned to the following service areas based on need: Utilities, Roads and Operations, and Parks and Recreation. Accordingly determine the staffing complement (see next slides)
- **SS1b:** Establish Supervisor backup for the Roads and Operations Team. This does not require hiring a 'new-new' individual but rather could consider placing additional responsibilities upon one more existing staff members.
- **SS1c:** Establish new position for a Data Analyst to support collection, validation, and analysis of Labourer data related to scheduling, work activities and cost allocations.

## Key Considerations

### Implementation

- The following slides provide preliminary consideration on the separation of Parks/Recreation from Public Works. It is recommended that the teams remain part of the same overall Department given the natural sharing of equipment/resources and potential for cross-over staffing arrangements.
  - It is recommended that operations staff/labourers be focused on Roads/Operations or Parks and Recreation, however they should have the same job description. Expected hours of operation would be different across the two groups

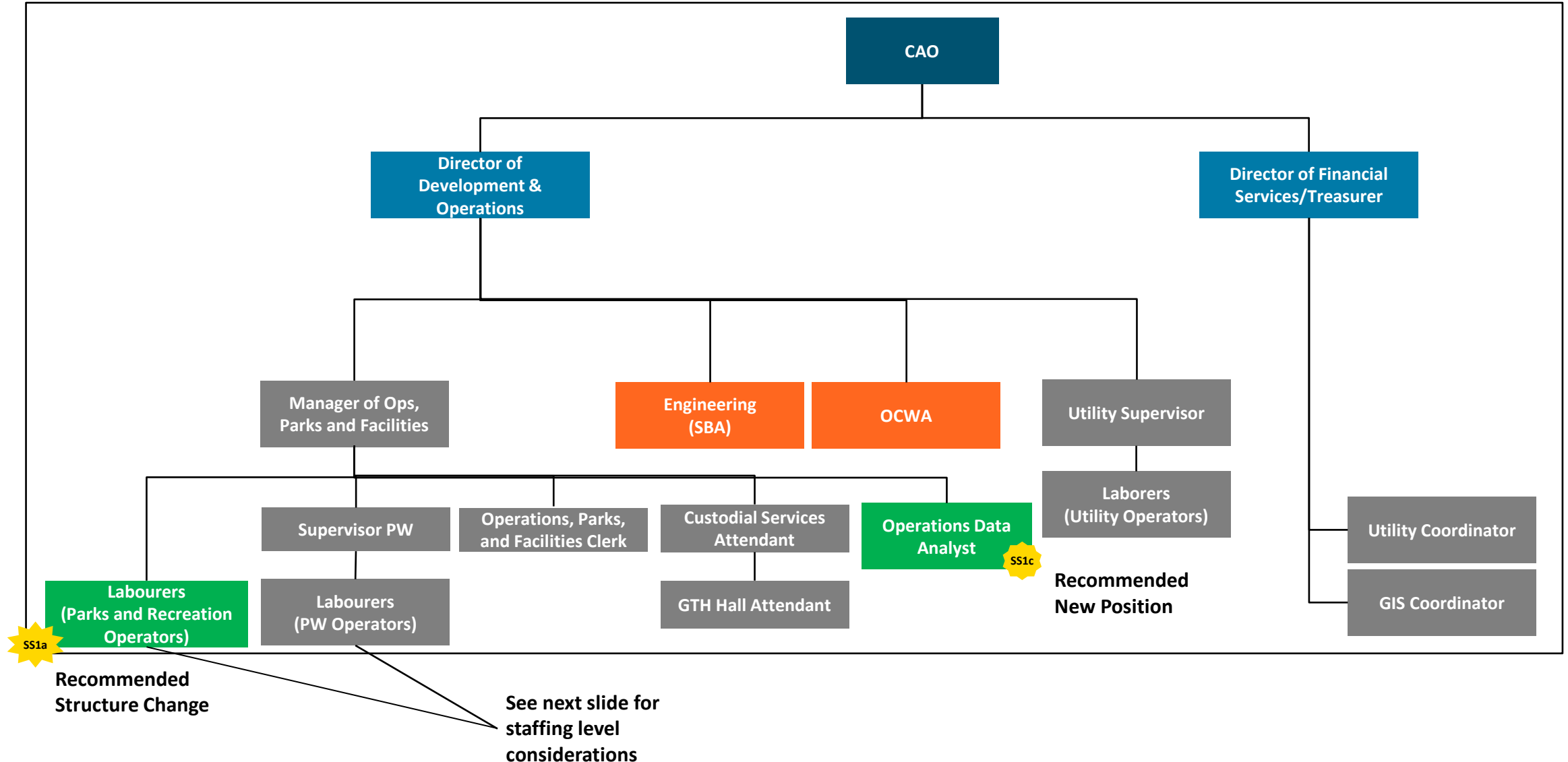
### Financial

- SS1a – There is not expected to be a financial cost associated with the decision to create separate Parks/Recreation and Public Works service areas. However, it is recommended that three additional staff are required to meet growing Town requirements. This would represent an additional \$200,000-\$250,000 staff costs per year
- SS1b – N/A – limited financial implications associated with ensuring training and clear responsibilities provided to PW team members to support supervisor
- SS1c – Estimated \$85,000 all in staff costs for Data Analyst

## Summary of Benefits

- Dedicated focus (prioritization of activities; schedule of staff; and KPI tracking) for Parks and Recreations and Roads/Operations which may result in the scaling up of parks and recreational services.
- A new structure could have three functions: 1) Development and Planning (Engineering; Planning); 2) Public Works/Operations (Roads, etc.); and Parks, Recreation, and Culture.
- Provision of backup coverage for the current Supervisor role could lead to better allocation of workload and greater efficiency across the team.

# Recommendations – Structure & Staffing



# Recommendations – Structure & Staffing

In addition to establishing Parks and Recreation and Operations/Public Works service area teams within the Development and Operations Department, additional staff resources should be considered to meet the growing needs of the Town.

- To establish a baseline of staff resources needed for the Parks/Recreation and Public Works service areas, the review team used recent budget figures which allocate staff costs to parks and operations activities.
  - Approximately 65% of staff costs are allocated to Public Works, with 35% allocated to Parks/Recreation
- Moving forward, the team has assumed an increase in the allocation towards Parks/Recreation for a 60-40 split between activities.
- Furthermore, to accommodate for anticipated Town growth, an estimated 50% increase in personnel has been estimated for. This represents an additional three FT staff. This would support Town growth and address shortcomings in staffing observed during the review. This addition will support additional population growth and provision of services to new sub-division areas and new infrastructure in the Town including the Dog Park and Splash Pad.
- Based on these assumptions, a recommended staff consideration to the service areas is presented as follows:
  - Parks and Recreation –
    - 3 Full Time
    - 5 Seasonal
  - Operations/Public Works –
    - 5 Full Time
    - 4 Seasonal
- Note, as the Town continues to grow, implements this revised structure, and can gain further insights through improved collection and analysis of timesheet and work activities data, consideration for a Labourer “pool” of resources will be required. This would involve designating some staff to move between the Parks and Recreation, Operations/Public Works, and Utilities teams based on time of year.
  - Traditionally this would involve staff working in the Parks and Recreation group during the summer months, and Operations/Public Works during winter months to assist with winter control activities.

# Recommendations – Structure & Staffing

## Current State Challenges

- Staff indicated that there is a preference for increased communications and frequency of updates regarding Town priorities and operations.
- As some staff that work closely with the Development and Operations team are not within the Development and Operations Department and work out of the Town Hall locations, there are less opportunities for regular interaction between some staff members and leadership outside of “all staff”.

## Proposed Recommendation

- **SS2:** Establish internal guidelines/commitments for team communications, updates

## Key Considerations

### Implementation

- Identify and schedule monthly meeting dates for Development and Operations Department. Consider inclusion of GIS Coordinator and Utility Coordinator. Invite other staff if/as needed.
  - Ensure key messages/updates communicated during meeting are documented and posted in writing for any staff member unable to attend monthly meeting.
- Implement mechanism for Development and Operations staff to ask questions of management prior to monthly meeting (i.e., Q&A).

### Financial

- N/A – limited financial implications associated with this recommendation.

## Summary of Benefits

- Establishing internal guidelines for team communications and updates would result in improved communication and information sharing daily and fewer opportunities for duplication of efforts stemming from gaps in communication.
- There would also be the opportunity to enhance staff recognition and opportunities for reviews/refreshers on new policy or procedures, etc. ensuring all staff members have received the same information from a reliable source.
- It will also result in the ability to provide more frequent communication in writing with staff that they can refer to at later staged and maintain in their records if needed.

# Recommendations – Processes & Service Delivery

## Current State Challenges

- Recent implementation of Citywide has supported electronic workflows for service requests and work orders for the operations team. It has reduced paper requirements throughout the Town's processes and activities and enhanced the speed at which work orders can be processed.
- Currently, there needs to be greater integration between Citywide and other tools used for Operations activities such as excel based planning and tracking.
- There is also minimal ongoing training/support for the team to ensure the accurate and timely use of Citywide – i.e., closing out activities and tasks.

## Proposed Recommendation

- **PSD1:** Clearly document the next phase of Citywide implementation and ensure accompanying staff training.

## Key Considerations

### Implementation

- Continue with training for Citywide workorder adoption among Development and Operations Department staff. Engage with staff to identify any specific knowledge/training gaps.
- As a next phase of Citywide work order rollout, consider integration of GIS capabilities and Citywide to reduce manual sync activities between systems.

### Financial

- Development of a roadmap for the future application of Citywide for the Town can be completed using existing staff resources and should not require significant additional investments.
- Financial costs associated with the addition of new modules or enhancements will be dependent on the requirements associated with the next phase of Citywide rollout.

## Summary of Benefits

- Reduced paper-based processes and improvements in responding to service requests and work orders for the operations team.
- Enhanced use for tracking activities and completed schedule of day-to-day to provide better insights into time requirements for activities and support KPI reporting and tracking.

# Recommendations – Processes & Service Delivery

## Current State Challenges

- The existing paper-based timesheet records limits the ability to conduct analysis of staff utilization across Development and Operation activities easily or in real-time.
- There is minimal data regarding Development and Operations activities that shows time spent and work efforts to support analysis of staff scheduling, utilization, and team capacity to deliver existing/ongoing operations and/or take on new projects.

## Proposed Recommendation

- **PSD2:** Revise time tracking requirements to collect information in greater detail on specific tasks and activities in all Development and Operations areas.

## Key Considerations

### Implementation

- A review of electronic tools to enable digital timesheet entries should be conducted. This should begin with the consideration for using Citywide as this is already used by the Town
- Having the timesheet data in electronic format will allow the evaluation, review, and revising the way work is scheduled and managed to ensure maximized value of the 8-hour day and should include review of non-productive time.

### Financial

- A more detailed collection of time/activity data and corresponding analysis to determine best practices in scheduling of work and identification of non-productive time (e.g., travel time), should be completed using staff resources. However, it is assumed and strongly recommended that this task be completed by the proposed Operations Data Analyst (Recommendation SS1c) given existing staffing pressures by the Town.

## Summary of Benefits

- Reduce time spent on manual logging/data entry of timesheets and provide ability to easily review staff utilization and team capacity levels to deliver existing/ongoing operations and/or take on new projects.
- Through analysis of this data, provide the ability to maximize the value of the 8-hour day

# Recommendations – Processes & Service Delivery

## Current State Challenges

- The Development and Operations Department's current formal onboarding process in place for new hires is principally for the health and safety requirements of the position. There is limited orientation for new hires to support their further understanding of the group's operations, workflows, and processes.
- Across both the Operations and Utility teams, there appears to be limited formal documentation of policies or procedures for required activities (e.g., road surface repairs, leaf collection, utility locates, etc.).

## Proposed Recommendation

- **PSD3:** Develop policies and procedures (process documentation) for Development and Operations Activities
- **PSD4:** Develop a formal training and onboarding process for new hires in the Development and Operations Department

## Key Considerations

### Implementation

- Existing policies and procedures should be reviewed to identify any out-of-date information or processes/requirements no longer used by the Town.
- Missing policies/procedures for key Development and Operations Department activities should be inventoried and prioritized for update
- Documentation of policies and procedures should be updated; relevant training and onboarding documentation for key activities should be reviewed concurrently.

### Financial

- It is anticipated that development of policies and procedures and training/onboarding processes be developed using staff resources. This would result in minimal financial implications. If external resources are required to develop process maps/policies and procedures additional costs would be incurred.

## Summary of Benefits

- Developing formal documentation of activities completed by the Development and Operations Team would help support training and compliance and would result in greater efficiency as it would reduce time for new staff to 'ramp-up' on operations processes and procedures.

# Recommendations – Processes & Service Delivery

## Current State Challenges

- The Town provides bulk water fills as a service by using mobile equipment connected to Town hydrants which requires the use of a backflow device to prevent any contamination entering the water system. However, the Town may only be conducting inspections on the backflow equipment on an annual basis, and not each time the device is connected to a new water source and used. This requires additional specialized equipment and training; and the act of conducting the inspection would require an estimated additional 30-minutes for bulk water filling.
- Water meters for developers and homeowners are supplied by Wamco Waterworks and Municipal Products and assembled by the Utility team before being shipped to the homeowner for installation. This represents a time-consuming activity for utility staff.

## Proposed Recommendation

- **PSD5:** Investigate requirements regarding backflow prevention equipment to ensure good practice is followed/limit use of mobile bulk water filling.
- **PSD6:** Explore opportunities to reduce staff time allocated to Water Meter kit assembly. For example, the final assembly of the water meters could be completed by developers or the homeowner (via licensed and qualified plumber).

## Key Considerations

### Implementation

- It is anticipated that once bulk water fills are conducted at the Town's new water tower, the need to use mobile backflow prevention equipment would be minimized. All bulk water fill should occur at the water tower, with the Town ceasing bulk water filling at other locations. This would eliminate the need to use the mobile backflow equipment.
- The Town should consult with WamCo Water Works and Municipal Products to develop a "Shelburne package" for water meters that can be shipped directly to homeowner/developer.

### Financial

- Minimal financial implications are anticipated by ceasing bulk water filling at locations requiring use of the Town's mobile backflow prevention equipment
- It is anticipated that there would be **savings** by having water meters shipped directly to the end user as it would eliminate the need for staff time to assemble water meters. However, as full-time staff currently complete this activity, this would not represent a decrease in budget requirements, rather, an opportunity to redeploy these staff resources to higher priority activities.

## Summary of Benefits

- Ensuring that the Town is in compliance with backflow prevention requirements for bulk water filling and that there are established and updated SOPs for this activity.
- Opportunity to explore the ability to incorporate the cost of this testing into the cost of bulk water filling.
- Having homeowners be responsible for assembly of water meters would remove the Town as a "middle-man" in this process and allow staff to focus on more value-added activities. It would also reduce liability for damaged meters and reduced need for storage requirements.



# Recommendations – Processes & Service Delivery

## Current State Challenges

- The Town currently stores its trackless sidewalk tractors at the 420 Victoria Street facility while Road plow trucks are stored at the 124 Luxton Way yard. Material for winter control surface application is stored at both locations. The situation of storing equipment at the two sites was driven primary by COVID-19 social distancing requirements as the Town had decided to sell the 420 Victoria Street site prior to COVID and its use had been reduced significantly prior to March 2020. The equipment and material stored at 420 Victoria will soon be relocated to 124 Luxton Way yard.
- Currently there are two routes for road and sidewalk clearing activities. At present, these routes require an estimated 7-9 hours to complete. During this time staff will refill vehicles with sand approximately 4 times over the course of the route. This can take upwards of 40 minutes (per refill) to complete when staff are traveling from the northern parts of the Town to the Luxton Way Yard. Approximately 2.5 hours of a 7-to-9-hour route is therefore spent traveling to refill surface material.

## Proposed Recommendation

- **PSD7:** Identify and assess options to support the pre-deployment of winter control surface materials, common road repair materials, and staff break facilities to central location(s) in Town.

## Key Considerations

### Implementation

- Initially, the Town should identify potential locations for a central surface material storage location in support of winter control operations (see next slide). Pre-deployment of winter control surface materials could be facilitated in temporary/seasonal storage solutions and would also require storage of tools/equipment to simplify loading of material to sidewalk clearing vehicles.
- Use Data Analyst time to develop a decentralized approach to replenishing road materials (initially winter control surface materials), as well as providing the staff with lunch and break options (including use of Town Hall facilities) that reduce the time spent traveling back and forth to the Luxton yard.
- A general rule of having materials and facilities available within 4kms. of any point in a route would be a practical initial consideration for optimization.

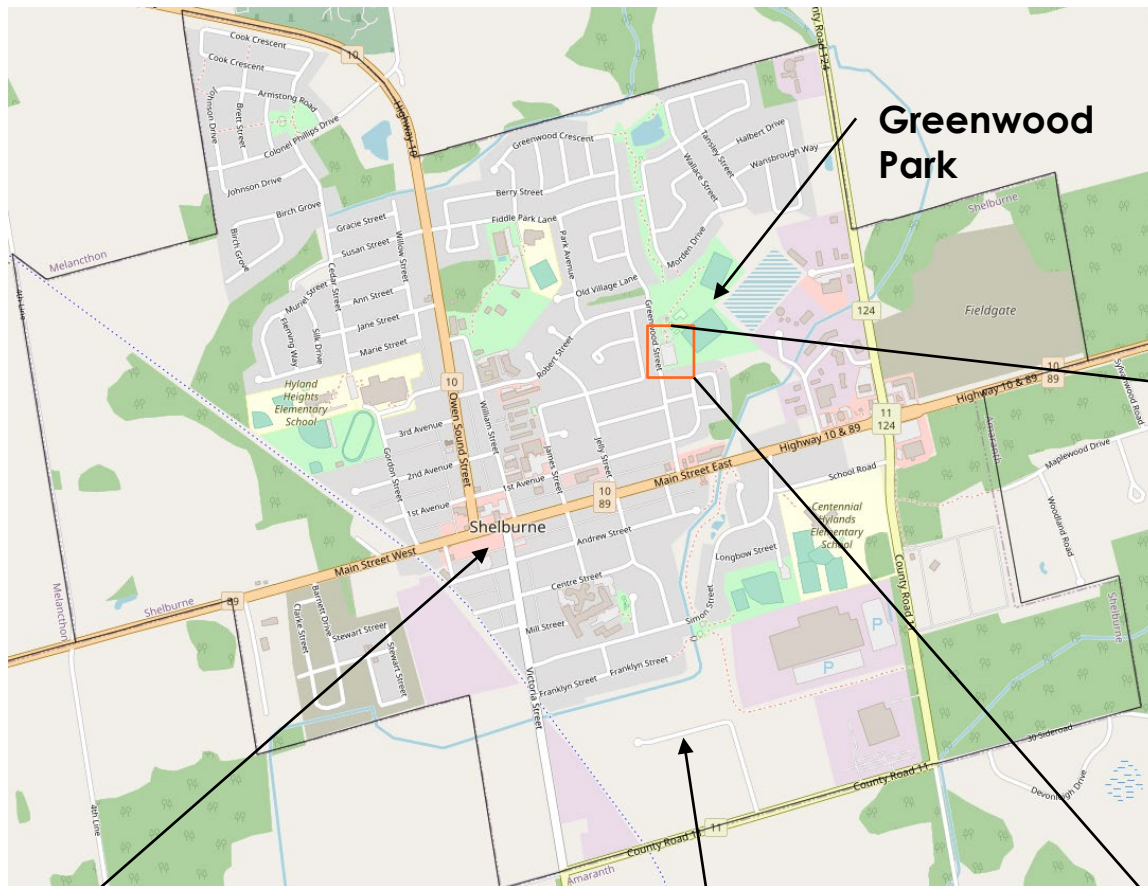
### Financial

- The pre-deployment of winter control surface materials could be stored on Town-owned property (for example near the Water Plant), avoiding costs for extra space. There would be an expected cost associated with securing and installing temporary storage equipment (i.e., “shipping containers”, cameras, and fencing).
- With implementation, it is anticipated that there would be time savings associated with each completed route (allowing staff time to be deployed elsewhere), as well as maximizing the productive time during the 8-hour day.
- With reduced travel it is also anticipated that there may be some fuel savings as well.

## Summary of Benefits

- A sand storage depot/location more centrally located in the Town would reduce travel time for crews completing sidewalk clearing. This could include temporary storage facility at a central location such as Greenwood Park.
- Reducing travel time for crews refilling sand by half, for sidewalk clearing alone, could result in upwards of 60-90 minutes time saving per route.
- Simultaneously, this would also result in maximized productivity during the 8-hour day, and the potential of reduced fuel costs.

# Recommendations – Processes & Service Delivery



## Shelburne Town Hall

- Town Hall could be used to facilitate staff breaks to mitigate travel time to the 124 Luxton Way Operations Yard

## 124 Luxton Way – Operations Yard

- Deployment of winter control surface material at Greenwood Park would provide a storage location more accessible for the Northern parts of winter control routes.
  - This would also help support the increase in overall winter control activities as the Fieldgate development comes online.



- Temporary storage units should be explored as an option for pre-deployment of sand used for winter control operations

# Recommendations – Processes & Service Delivery

## Current State Challenges

- Grass cutting is logged via manual entries in a paper binder when written up in field, which may get damaged and/or result in lost records of key activities in the Parks.
- Currently, the Operations team has a schedule for regular grass cuts for Town property. However, this schedule is not based on service standards, nor is performance against this schedule reported on a regular basis. Thus, adherence to the schedule is not easily known by the Operations team which limits analysis and decision-making abilities regarding operational efficiencies.
- Further, maintaining the grounds of the recently established Cricket Field is anticipated to be more resource intensive exercise and costly requirement compared to amateur soccer fields. The newly installed Splash Pad has unknown future maintenance requirements.

## Proposed Recommendation

- **PSD8:** Align Grass Cutting Operations to Service Level expectations for grass cutting across the Town. See Recommendation SKC2 for additional information on recommended KPI development and reporting.

## Key Considerations

### Implementation

- Review and align on service levels for grass cutting across the Town with clear communication to Council and the public. Consider the specific requirements associated with various sports fields and park areas.
  - Consideration for cost-benefit analysis for service levels should be given in the development of these expectations. Specifically, this should include analysis of Cricket Field requirements given recent discussions/requests between the public and Town.

### Financial

- Establishing SLAs and formalizing KPIs is not anticipated to require significant financial resources beyond existing staff time.

## Summary of Benefits

- With full recording and reporting of grass cutting (including Cricket Field maintenance activities), the Town will be able to optimize or look for efficiencies in this area beyond subjective reviews. This recommendation links to the Recommendation SS1c, with the addition of the Data Analyst role. Detailed analysis will help determine an accurate estimate of the costs associated with maintaining outdoor assets including the Cricket Field; soccer and baseball fields; and parks and facilities. This should also consider opportunities to explore partnerships with community groups to share in the work effort associated with maintaining various assets (See Recommendation PSD10).
- A cost-benefit analysis together with established service standards would also result in evidence-informed decision making by stakeholders.

# Recommendations – Processes & Service Delivery

- Specific to grass cutting, good practice for KPI reporting involves monitoring achievement of established service standards.
- For each route (which would include park space) a cut frequency is clearly established. Reporting against this frequency allows for the development of KPIs.
- Consideration for weather events should be included in KPI calculations

Team	Measure	Purpose
Parks and Recreation	Achievement of grass cuts per schedule	Inform service levels and utilization, trends and support benchmarking

KPIs calculated based on clearly established service levels

All routes include the cutting and trimming of all turf within the park, boulevard or greenspace. Staff are required to trim back branches from fence lines, weed whip all trees, signs and objects. Staff are also required to do full leaf cleanup and turf repair as needed.

Route Name	seasonal staff	student	full time	Cut frequency
c1				1/week
c2				1/week
c3	x			1/week
c4			x	1/month
c5			x	1/month
c6			x	1/week
ct1	x	x		1 every 2 weeks
ct2	x	x		1 every 2 weeks
ht1	x	x		1/week
t1		x		1 every 2 weeks
t2	x	x		1 every 2 weeks
t3		x		1 every 2 weeks
t4		x		1/month
t5	x	x		1 every 2 weeks
Main Park	x			1/week
yard	x			1/week
trails	x	x		1/month

Sample of peer municipality service levels for each grass cutting route in the Town.

For each route, additional details are provided on the exact areas of grass to be cut (i.e., parks areas; roadside areas; trails; etc.). These details have been developed by staff for Shelburne routes.

# Recommendations – Processes & Service Delivery

## Current State Challenges

- The use of a vendor to support grass cutting at Greenwood Park may represent an inefficient use of Town resources, and an opportunity to consolidate work into the Operations team.
- An external vendor currently completes the cutting of the two Greenwood Park fields (Thunder Field and Brigands Field). This includes weekly cutting and trimming from May 1-Oct. 31.
- In discussions with staff, it was noted that staff resources conduct cutting of all Greenwood Park grass surrounding the two fields, also on a weekly basis. It was also noted that staff use the equipment that is appropriate for completing the field cutting.
- Adding the two fields to Greenwood Park cutting requirements of staff would represent an additional 5 acres of cutting responsibility. Considering staff are already onsite and engaged in cutting activities, this not a significant addition to staff requirements. (see next slide)

## Proposed Recommendation

- **PSD9:** Review and revise contractor model for grass cutting across all needs of the Town following Service Level review (PSD8) above.
- The Town should consider moving in a direction that has staff focus grass cutting efforts on higher-priority/higher standard areas (i.e., playing fields – soccer, baseball, etc.); and using vendors for high-volume areas such as roadside and open fields.

## Key Considerations

### Implementation

- Confirm ability of staff to complete field cutting with existing equipment. Review total grass cutting requirements out of PSD8 (SLAs) to determine appropriate mix of Town and contracted services. Link to Data Analyst role to support review. (Recommendation SS1c)
- The Town should not renew the contract with the external vendor for the 2023 season and include field cutting in the areas to be cut by Town staff.
- Cutting of the fields for the 2023 season could be considered as a pilot, with exact staff time required to complete all cutting at Greenwood Park monitored. This would allow for a fulsome review of staff costs to complete cutting activities and comparison against third-party vendors. The Town should then consider moving towards a model that uses vendors to cut high-volume areas with staff focused on areas with higher standards/level of service such as playing fields where Town staff are also already involved in general upkeep and maintenance of fields.

### Financial

- Town costs for the external vendor cutting are approximately \$14,000 per year for the cutting of Thunder Field and Brigands Field. Transitioning this responsibility to staff would result in some additional fuel/maintenance costs for equipment, and an estimated 1.5-2.5 additional hours of staff time to complete cutting at Greenwood Park.

## Summary of Benefits

- Likely overall cost savings for the Town as Development and Operations staff currently maintain grass cutting activities at Greenwood Park
- Efficiency gains by having grass-cutting subject to agreed service levels and incorporating contracted services where appropriate



# Recommendations – Processes & Service Delivery

Town staff have existing responsibility for cutting areas shaded green. Proposed recommendation involves adding playing fields to the areas cut but Town Staff



*Greenwood Park – Town cutting responsibilities*



*Greenwood Park – Thunder Field*

# Recommendations – Processes & Service Delivery

## Current State Challenges

- Volunteer programs to support parks and recreation activities present an opportunity to promote community engagement and support successful operations of Town recreation sites. Based on discussions with Town staff, there appears to be an interest from community groups to take a greater level of involvement in the light maintenance/upkeep of some outdoor recreation assets.
  - Currently, community groups are already involved in Baseball diamond playing preparations
- To date, there has not been a formal operating structure for volunteer oversight or coordination of volunteer programs.

## Proposed Recommendation

- **PSD10:** Develop and implement volunteer program for Parks and Recreation support

## Key Considerations

### Implementation

- Terms of Reference and recruitment for a volunteer program for Parks and Recreation Support should be drafted. Consideration should be given to first partnering with existing community groups that could support 'coordination' of volunteers and promote specific volunteer events – i.e. "Spring Clean Up"; light trail maintenance; outdoor ice-rink inspections (Caledon, Mono, Halton Hills have established programs to support engaged community members volunteer in support of recreation activities).
- For long-term success of volunteer activities, a volunteer operating structure should be established to clearly define roles and responsibilities of volunteer efforts.

### Financial

- Staff time would be required to develop initial Terms of Reference and coordinate/oversee any volunteer activities. This is not anticipated to be a significant time requirement, however effort should be monitored to ensure activities represent an appropriate use of staff time.

## Summary of Benefits

- A volunteer program could offset costs associated with light park maintenance for a limited time period; and develop community engagement opportunities.

# Recommendations – Processes & Service Delivery

## Current State Challenges

- While the Town does not currently have a Fields Allocation Policy (for the use of park facilities to individuals, groups, or leagues), staff are in the process of developing one, set for completion December 2022. Without a policy, there is no formal prioritization of user groups resulting in ad-hoc distribution without any fairness parameters. There is also a lack of clarity on the provision of services-in-kind by the Town to support organizations booking facilities.
- The Town does not have a dedicated recreation management tool to support the end-to-end booking management process, resulting in the need for manual updates to the availability scheduled and manual linkages between platforms such as the online calendar and Keystone. There is also some uncertainty regarding appropriate fee structures and booking times.
- Currently, there is no policy for non-monetary donations to the Town (i.e., trees, flowers, benches, etc.) - such donations, while valuable, must be carefully planned and accepted in ways that do not place unnecessary burden on long-term sustainability.

## Proposed Recommendation

- **PSD11:** Review existing field rates, booking process, and corresponding contracts
- **PSD12:** Develop and implement a non-monetary donations policy

Note: early drafts of the SDR report included a recommendation to complete and implement a Field Allocation Policy and Community Service Organization definition. However, since beginning this SDR process, the Town has undertaken this activity internally with an estimated completion date of December 2022. Therefore, this has not be included as a separate recommendation. However, benefits have been reiterated to reinforce the importance of this activity.

## Key Considerations

### Implementation

- A market scan of recreation focused tools that support the booking process for fields/facilities should be undertaken with a focus on identifying opportunities to improve the staff and user/resident experience.
- Consideration should be given to a tool that enables online viewing of facility information, costs, and availability on specific dates. Residents should also be able to initiate the booking process online, with contracts and other required documentation managed through the software solution to facilitate a streamlined user and staff experience

### Financial

- Policy development for non-monetary donations could be supported with in-house staff resources.
- Reviewing existing field booking processes, contracts and user experiences could be conducted in-house. If external support is required, it would be estimated at less than \$50,000 in costs. Any system/technology upgrades (if required) would represent additional costs.

## Summary of Benefits

- A Fields Allocation Policy would result in increased fairness to field allocation and promotion of use by community service organizations as well as improved decision-making support/guidelines for staff. It would also result in enhanced customer experience when booking; and ensure rates and fees reflect use of fields for all sports and activities; while resulting in reduced staff time associated with finalizing facility booking.
- Increased clarification in communications with residents regarding non-monetary donations would help ensure donations align with the Town's strategic directions as well as ensure the donation is viable (which is of high relevance to the Operations team)



# Recommendations – Service KPIs & Communication

## Current State Challenges

- The Town’s FAQ guide on its website which provides information on key activities is not currently linked to the “submit complaint” online form, thus limiting residents’ better understanding of Town activities which results in more complaints.\*
- Further, Members of Council often receive complaints and requests from residents and businesses directly. While these should be directed to the Town’s official processes and channels, members of Council also have an opportunity to support resident education regarding Town processes and standards. However, Council Members may not always be provided with the tools and key speaking points to help educate residents on issues related to services provided by the Town.

## Proposed Recommendation

- **SKC1:** Enhance a Council Orientation Package and Process

## Key Considerations

### Implementation

- Work with the Clerks department to identify additional opportunities to expand the Council Orientation program to include more information on operating issues, workflow, etc. for members of Council that outlines the key activities of the Town;
- A critical element of orientation material should be including clear rationale for why processes/activities designed the way they are and expected outcomes/service levels. This would provide Council with the tools and key speaking points to help educate residents on issues related to services provided.
- Other interactive/innovative ideas should be considered such as Council tours of the Public Works facilities; video summaries of core activities (i.e., road repair, line painting); and summaries of a “week in the life of a Public Works Operator”

### Financial

- N/A – limited financial implications associated with this recommendation.

## Summary of Benefits

- The Council Orientation program could be expanded to include more information on operating issues, workflow, etc. for members of Council that outlines the key activities of the Town; rationale for why they are completed that way; and expected outcomes/service levels. They could also be supported by the FAQ webpage that provides accurate information on Town’s service activities.
- Providing Council with good orientation material can assist members of Council in discussing with residents regarding activities completed with respect to all Town services. It could also result in reduced misinformation provided to residents; enhanced Council understanding of Development and Operations activities, and the ability to make evidence informed decisions on an ongoing basis.

\*Note: During the course of this review, the Town updated it’s website to link the Compliant Page and FAQ Page. This was completed as a quick-win in fall 2022.

# Recommendations – Service KPIs & Communication

## Current State Challenges

- Across the activities completed by the Development and Operations Department there are limited examples of KPIs or service standards in place (for activities related to roads, utilities, parks and recreation).
- Without the collection and tracking of KPIs, the Town is also not currently able to report with certainty on activities or performance of the Development and Operations Department
- Historically, the Town has likely been limited in the ability to efficiently collect and report on KPIs due to the reliance on manual and paper-based processes. However, the Town's commitment to technology implementation (including Citywide) presents an opportunity to leverage enabling systems to establish reporting practices.

## Proposed Recommendation

- **SKC2:** Develop KPIs for Development and Operations Activities

## Key Considerations

### Implementation

- Establishment of KPIs should consider the ability to monitor trends (to support cost/staffing requirements) and understand resident satisfaction. The Fall 2021 SDR developed for the Town includes recommendations on incorporating KPIs into the Town's decision-making framework. The following slides provide suggested KPIs for the Town's consideration.

### Financial

- Establishing SLAs and formalizing KPIs is not anticipated to require significant financial resources beyond existing staff time and costs considered for new Data Analyst position described in recommendation SS1c.

## Summary of Benefits

- The presence of KPIs and service standards strengthens the Town's ability to communicate performance and set expectations with residents and businesses
- Established KPIs and service standards would also be helpful in for the Town to assess performance value for investments.

# Recommendations – Processes & Service Delivery

Team	Measure	Purpose
Public Works/Roads	Road operations and maintenance cost (\$ per lane KM)	Inform service levels, trends and support benchmarking
	Sidewalk operations and maintenance cost (\$ per KM)	Inform service levels, trends and support benchmarking
	Debris swept from streets (tonnes)	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Material used for pothole repairs (tonnes)	Inform trends and support benchmarking; inform activity volumes/cost trends
	Road shoulder repairs (kms)	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Road repair (tonnes)	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Graffiti control (# of sites)	Inform service levels, trends and support benchmarking; resident satisfaction
	Salt material application (tonnes)	Inform trends and support benchmarking; inform activity volumes/cost trends
	Winter response and activations (days)	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Winter events (set of days)	Inform service levels, trends and support benchmarking
	Road closures – special events	Inform Trends; inform activity volumes/cost trends
	Traffic Sign Workorders planned	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Traffic Sign Workorders unplanned	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Traffic Signals Workorders planned	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Traffic Signals Workorders unplanned	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Street light workorders planned	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Street light workorders unplanned	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Percentage of street lights in service	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends
	Percentage of resident issues addressed within 24 hours	Inform Resident satisfaction, trends and support benchmarking;
	Number or waterline breaks	Inform service levels, trends and support benchmarking; inform activity volumes/cost trends

# Recommendations – Processes & Service Delivery

Team	Measure	Purpose
Parks and Recreation	Operating costs of parks per capita	Inform service levels, trends and support benchmarking
	Operating costs per hectare maintained and natural parkland	Inform service levels, trends and support benchmarking
	Trails operations and maintenance costs (\$ per KM)	Inform service levels, trends and support benchmarking
	Percentage of Residents Satisfied with Parks	Inform Resident satisfaction, trends and support benchmarking; resident satisfaction
	Park Attendance	Inform service levels and utilization, trends and support benchmarking
	Utilization of outdoor fields/facilities	Inform service levels and utilization, trends and support benchmarking
	Achievement of Playground Inspection per schedule	Inform Resident satisfaction, trends and support benchmarking; resident satisfaction
	Number of Parks and Recreation volunteer hours	Inform resident engagement, trends and support benchmarking
	Achievement of grass cuts per schedule	Inform service levels and utilization, trends and support benchmarking

*Note: it is anticipated that additional KPIs may be developed based on the recommendations from the Town's Parks and Recreation Master Plan*

# Recommendations – Human Resources

## Current State Challenges

- The compensation and on-call policy currently in place for Operations staff may not be aligned to neighbouring communities. Reflections and revisions are needed with regards to staff compensation, which is currently a priority of the compensation market review (the Ward and Uptigrove Report) that is being undertaken by the Town.
- Staff confusion related to performance reviews or appraisals process results in limited provision of formal feedback on team performance. Further, staff are unaware of their designated contact for HR related matters.

## Proposed Recommendation

- **HR1:** Determine action resulting from review of Compensation Policies and Levels for Development and Operations Staff (i.e., the Ward and Uptigrove Report).
- **HR2:** Refresh (as needed) and relaunch Formal Performance Reviews for the Development and Operations staff
- **HR3:** Provide clear articulation of the support role that the new HR Coordinator will provide to staff

## Key Considerations

### Implementation

- HR Coordinator to work with Manager and Supervisor to confirm requirements/supports needed for relaunch of Performance Review processes (i.e., support to communicate requirements, objectives, benefits, etc. of existing processes)

### Financial

- N/A – limited financial implications associated with this refresh/relaunch of Performance Reviews
- Costs associated with required changes to compensation policies and levels TBD based on compensation market review.

## Summary of Benefits

- Compensation policies/practices that are aligned with neighbouring communities and result in a degree of standardization across municipality staff. This also addresses identified gap in existing Departmental practices; better alignment with good practice for employee development; growth; and retention.
- Standards in place for opportunities to enhance the reward and recognition of the Development and Operations staff to ensure a high-level of morale among critical employees.
- The Town's Performance Review/Appraisal processes for Development and Operations Clearly are clearly communicated and formalized as part of the responsibilities of the new the new HR Coordinator. This provides an opportunity to address and respond directly to staff feedback and comments.



# Appendices

## Detailed Current State Findings

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→ September 2022



*A People Place, A Change of Pace*  
**SHELBURNE**  
ONTARIO, CANADA



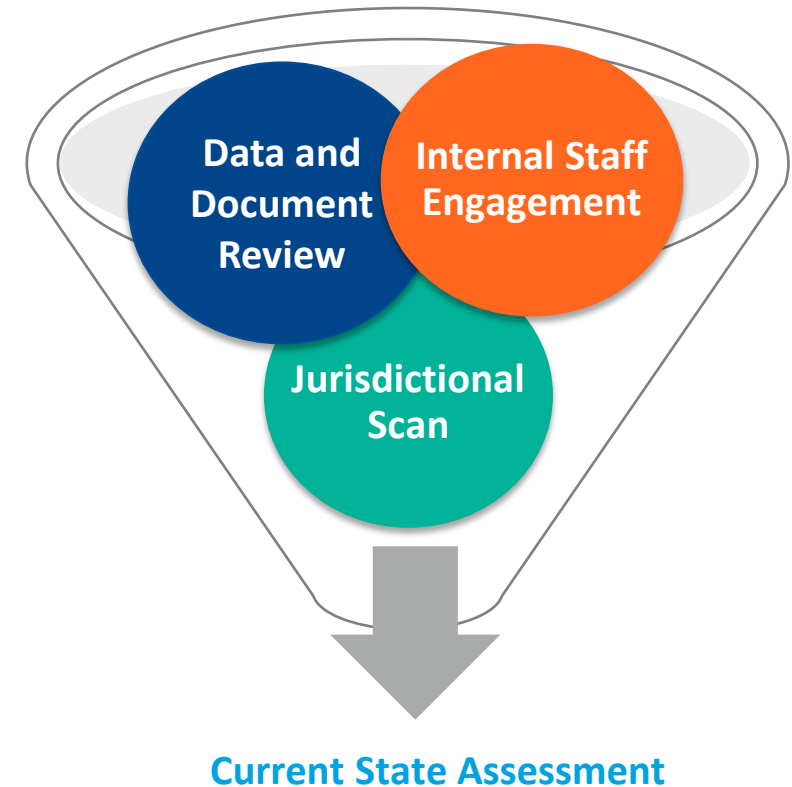
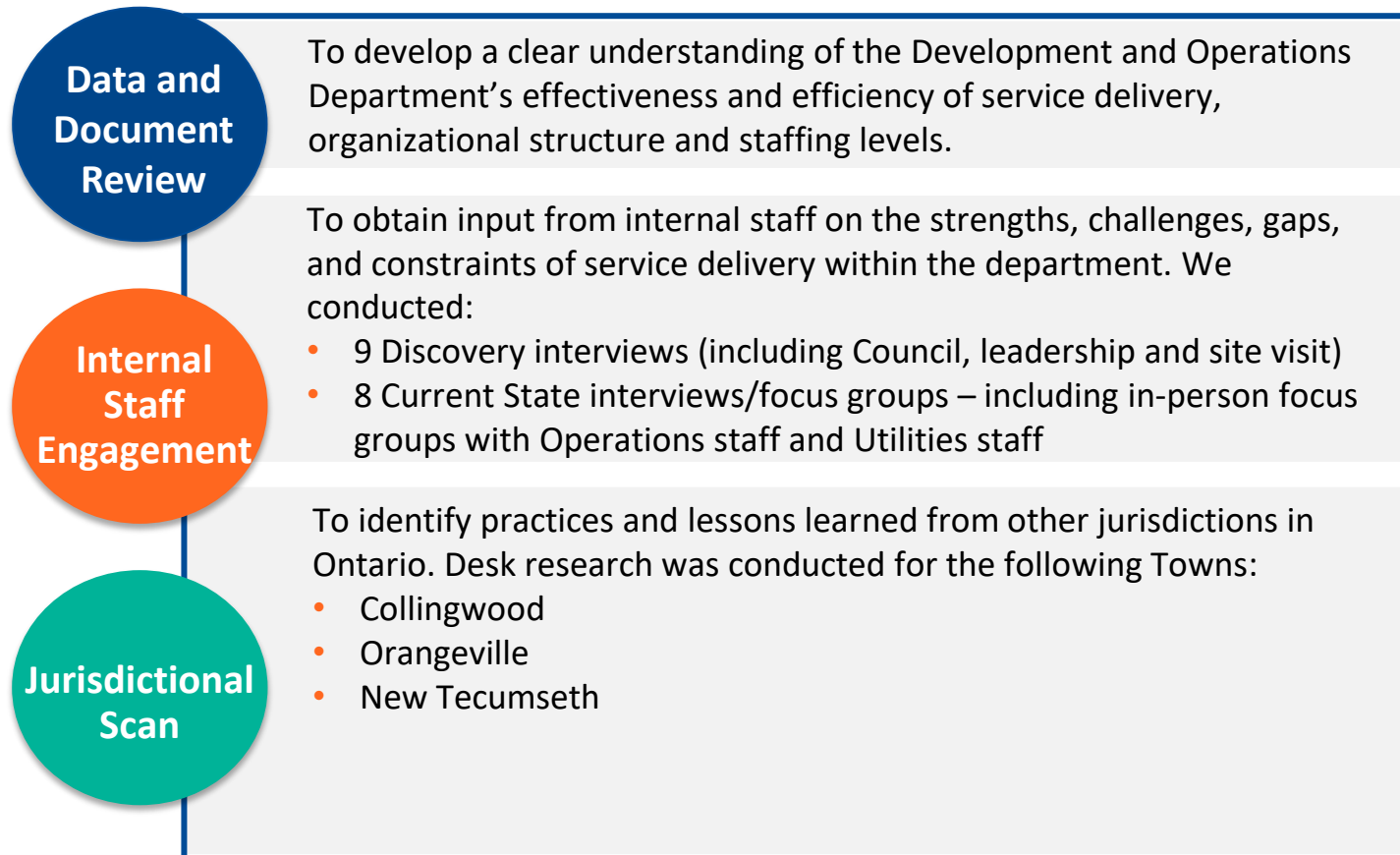
→ Review of Development and  
Operations Department

## 1. Current State Methodology

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# Review Methodology

Current State Assessment findings were developed based on information gathered through internal staff engagement, internal document and data review, and a jurisdictional scan to understand service delivery and operational structures.





# Discovery Interviews Conducted

Optimus SBR conducted nine (9) discovery interviews with the following individuals across the Department as well as members of the Town's Council:

Name of Stakeholders		Title of Stakeholders
<b>Development and Operations Department</b>		
1	Denyse Morrissey	CAO
2	Jim Moss	Director, Development and Operations
3	Will Thomson	Manager of Operations Parks and Facilities
<b>Council for the Town of Shelburne</b>		
4	Wade Mills	Mayor
5	Steve Anderson	Deputy Mayor
6	Walter Benotto	Councillor
7	Kyle Fegan	Councillor
8	Lindsay Wegener	Councillor
9	Lynda Buffet	Councillor
10	Shane Hall	Councillor

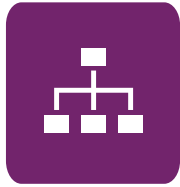
# Internal Staff Engaged

Optimus SBR engaged the following internal stakeholders to develop a clear understanding of the efficiency and effectiveness of the Development and Operations Department.

Name of Staff		Staff Titles
1	Denyse Morrissey	CAO
2	Jim Moss	Director of Development and Operations
3	Will Thomson	Manager of Operations Parks and Facilities
4	Brad MacDonald	Operations Supervisor
5	Rob Matthews	Utilities Supervisor Water/Sewer Department
6	Joanne Marceau	Utilities Coordinator
7	Melissa Kenny	Communications Coordinator & Administrative Assistant
8	Jamie Kaske	Operations, Parks & Facilities Clerk
9	Patti Hossie	Customer Service Coordinator/Deputy Registrar
10	Chad Smith	GIS Coordinator
11	Utilities Team	Full-time and contracted Utility Operators and Operator/Labourers
12	Operations Team	

## Focus Areas

The focus of this review has been on the following areas: Structure and Staffing, Processes and Service Delivery, and Service KPIs and Communications for the Department.



### Structure and Staffing

- Increased pressure on staff to switch responsibilities between Public Works and Parks and Recreation operations.
- Recognition of the differing requirements of Public Works functions and those of Parks and Recreation.
- Need for clear definition of roles and responsibilities in a new structure where the two functions are separated.
- Clarity is required on staffing levels associated with Public Works and Recreation services and summer to winter activities.



### Processes and Service Delivery

- Possible requirement for additional equipment to meet increased demands from a growing population.
- Increased efficiencies resulting from the implementation of the GIS/Workorder system – opportunities to further leverage.
- Several of the Department's staff working overtime due to increased responsibilities coupled with recruitment challenges in hiring new staff.
- Increased use of online systems particularly during COVID-19 pandemic.

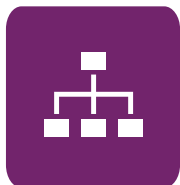


### Service KPIs and Communications

- General satisfaction overall with the level of responsiveness and interaction with the Department staff and the services provided (based on Council consults, for this review and previous SDR work).
- Increased emphasis on adding new services/facilities - dog parks, cricket fields, tennis grounds, splash pad etc.
- Need for organized provision of services by the staff during non-traditional hours such as the evenings when most parks and recreational facilities are used.
- Need for a more formal system of work orders.
- Absence of an allocation policy and fee considerations for facility utilization.

# Core Questions

Based on the emerging themes, the following were confirmed as core questions to be addressed in the Current State and Future State project activities:



## Structure and Staffing

1. What is the optimal structure for providing services currently delivered by the Development and Operations Department?
2. What are the approximate staffing levels/requirements for Operations (Public Works, Utilities) and Parks and Recreation activities?
  - FTE considerations
  - Scheduling
  - Changes in Summer-Winter requirements



## Processes and Service Delivery

3. What opportunities exist for efficiencies in services provided by the Department? Initial considerations:
4. How can the Town's work order system / use of GIS be expanded further to support service delivery?
5. What impact does Town growth have on fleet management/equipment level requirements?



## Service KPIs and Communications

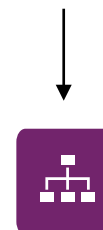
6. What measurements (KPIs) should be in place for services provided by Development and Operations
7. How can/should activities and services performed by the Development and Operations team be communicated to Council and residents (i.e. Council orientation; FAQ on services, etc.)

# Theming of Key Findings and Observations

Key findings from the current state review have been themed into 6 categories. These findings support the recommendations developed to address each of the focus areas for the review.

Finding Category	Description of Theme
Primary Activities	<ul style="list-style-type: none"> <li>General observations and description of the scope of tasks and activities completed by the Development and Operations Department – these are specific to activities related to road and winter maintenance, Town operations, parks and recreation, and special events.</li> <li>These findings provide insights into the volume of work completed across the team.</li> </ul>
Team Structure	<ul style="list-style-type: none"> <li>Observations and findings related to how the Development and Operations team is organized to deliver required services.</li> <li>This includes the organization of the Development and Operations Department; roles and responsibility; and internal team communications and human resources.</li> </ul>
Team Processes and Workflows	<ul style="list-style-type: none"> <li>Observations and findings related to how the Development and Operations team completes key activities.</li> <li>These findings provide insights into potential opportunities for process and workflow efficiencies for the team.</li> </ul>
Equipment, Tools, Technology, Vehicles, and Facilities	<ul style="list-style-type: none"> <li>Findings related to the impact that technology, systems, equipment, tools and facilities used by the Development and Operations team has on the efficient and effective completion of required activities.</li> </ul>
Communications, KPIs, and Outcomes	<ul style="list-style-type: none"> <li>Findings related to external communication regarding the Development and Operations Department activities and the monitoring of service standards or Key Performance Indicators (KPIs).</li> </ul>
Overarching Engagement with HR	<ul style="list-style-type: none"> <li>Findings related to overarching HR concerns that can be attributed to all Departments and not necessarily attributable to the Development and Operations Department on its own.</li> </ul>

→ Key findings will support the development of recommendations related to the focus areas of the review



Structure and Staffing



Services



Processes



→ Review of Development and  
Operations Department

## 2. Current State Findings

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# Theming of Key Findings and Observations

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→ Key findings will support the development of recommendations related to the focus areas of the review



Structure and Staffing



Services



Processes

# Primary Activities

## Primary Activities

*The Development and Operations team includes Operations staff that are responsible for the Town's road network and general public works activities.*

### Activities

#### The Network

- The total length of roadways according to the latest Asset Management Plan dated June 2022 is 38.90 kilometers, consisting of 34.8 kms. of asphalt base or surface and 4.1 kms. gravel. The total lane kilometers of the roadways is stated as 70.74 kilometers.
  - All Road Key Performance Indicators are monitored to Reliability, Safety, and Responsiveness to achieve a 100% compliance to stated metrics. Responsiveness is noted within 1 business day following contact via phone or email.
  - There are approximately 31 kilometers of sidewalks that are maintained by the Town.
- There are 142 culverts and 3 pedestrian bridges maintained by the Town
  - All Bridge and Culvert Key Performance Indicators are monitored with respect to Reliability, Safety, and Responsiveness and have similar 1 business day response time noted above.

#### Summer Maintenance Activities

- Summer activities include miscellaneous road and sidewalk repairs, resurfacing and gravelling, repainting pavement markings, roadside maintenance (mowing, ditching, shouldering), Street sweeping, dust control and culvert replacement.

#### Winter Maintenance Activities

- Winter control maintenance is performed under a priority system. Snow plowing prioritizes the streets such as Greenwood Street, Fiddle Park Lane, Simon Street and Victoria Street to be cleared first, followed by local residential streets, crescents and courts. GPS units in the winter vehicle ensures that each route is serviced to schedule. In addition, there are four Sidewalk Clearing Routes defined as Downtown #1 and #2, School #1 and #2, also organized to prioritize the snow removal from sidewalks.

#### Year-Round Activities

- Sign and Light Inspections and maintenance, Traffic Logix signs placement, vehicle and equipment inspection and minor maintenance, garbage clearing from fence lines and ditches, tree clearing, repairs to boulevards.



# Primary Activities

## Primary Activities

*The Development and Operations team includes Operations staff are also responsible for parks and recreational activities, special events, and cemetery operations.*

### Activities

#### Parks Facilities:

- The Development and Operations team maintains the grounds for over 43 hectares of park and facilities across 13 different parkland areas in the Town of Shelburne. Within these parks are contained:
  - Sporting/Recreation facilities including: 7 Soccer pitches, 4 Baseball diamonds, 2 Basketball courts (one full, one half-court), 14 play structures, 6 Swing sets, 9 slides, a BMX track and a Skateboard Park, 3 Outdoor ice rinks, 1 skating track
  - Comfort/Other Structures including: 3 Washroom Buildings, 2 Pedestrian Bridges, 1 Boardwalk, 2 Pavilions, 1 Gazebo, 1 Shade Shelter, 1 Fiddle Park Building, 2 Storage and 1 Garage structure
  - 5.6 kms of maintained public trails
  - Additions to facilities in 2021 and 2022: tennis court, cricket pitch, splash pad, off-leash dog park
- The Centre Dufferin Recreational Complex is jointly owned by the Towns of Shelburne and Mono, and the Townships of Amaranth and Melancthon. The CDRC Complex includes 2.2 hectares of grounds, 1 indoor ice rink, 1 outdoor pool, recreation facilities and meeting rooms. *Its operations are not part of the Town of Shelburne's Development and Operations team.*

#### Activities:

- The Parks' activities consist of both on-going and seasonal opening/closing requirements. These include:

#### On-going activities

- Summer: Grass-cutting, pesticide control, and sports field preparation and maintenance
- Public washroom cleaning and maintenance
- Winter: Ice Rink and skating track maintenance
- Trail Maintenance, Tree inspections and trimming
- Playground and splash pad inspections and maintenance
- Park and Downtown Garbage collection, Dog park inspection and maintenance

#### Seasonal opening/closing activities

- Painting/building picnic tables
- Preparation and close-down of Public washroom facilities
- Seasonal cleaning of parks, Fiddle Park snow dumpsite, placement and removal of garbage bins
- Leaf cleanup
- Place / Remove Benches in Downtown and Picnic Tables in Parks

# Primary Activities

## Primary Activities

*The Development and Operations team includes Operations staff are also responsible for parks and recreational activities, special events, and cemetery operations.*

### **Parks Activities (continued):**

- There are also three other areas, currently seen as Parks and Facilities activities that are staffed by the Development and Operations team. These are:
  - 1 - Administration for Parks and Facilities provided by the Operations, Parks and Facilities Clerk. This includes:
    - Public Works Service Requests capture from public calls/complaints, Temporary Road/Occupancy permits, Vehicle GPS oversight, Traffic lights confirmation, RFP queries
    - Facility Rental: inquiries, booking, site visits, payments, community event insurance for CDRC, CDRC Recreational guide
  - 2 - Special Events in the Town
    - There are many Shelburne events and festivals throughout the year requiring varying levels of support by the Development and Operations team. Preparation, inspection/maintenance, and post-event clean-up of park venues, streets, and facilities are assigned duties to the team. In recent years, while under the pandemic restrictions of Covid-19, these were somewhat diminished. However, as restrictions ease, there has been a heightened requirement to resume these activities as early as this year. Examples of such events from past years have included:
      - Easter Event, Farmer's Market opens, Street Festival, Canada Day Celebration, Pickin in the Park, Fiddleville, Shelburne Fall Fair
      - Remembrance Day and Downtown Christmas Decorations
- Cemetery Operations and Services
  - Cemetery related activity/service is delivered by the Development and Operations team. Cemetery services are primarily delivered through a seasonal contracted individual. These activities include:
    - Seasonal opening and closing of the Cemetery
    - Cemetery grass cutting and maintenance
    - Spring burials
    - Seasonal burials

# Primary Activities

## Primary Activities

*The Development and Operations team includes Operations staff are also responsible for parks and recreational activities, special events, and cemetery operations.*

### Parks Activities (continued):

- 3 - Cemetery
  - This activity is provided by the Development and Operations team via a seasonal contracted individual. This includes:
    - Seasonal opening and closing of the Cemetery
    - Cemetery grass cutting, maintenance, and staffing – May 1<sup>st</sup> to November 1<sup>st</sup>
    - Internments occur between May 1<sup>st</sup> and November 1<sup>st</sup> – outside of these dates the mortuary is used until internment the following Spring
    - Cemetery operations are guided by Town of Shelburne By-Law 39-2019 Maintain, Manage, Regulate and Control the Shelburne Cemetery
  - The Shelburne Cemetery is a 21.83-acre property owned and operated by the Town of Shelburne. The cemetery is divided into 25 open Wards currently, with most new internments going to 3 Wards where there are approximately 998 burial plots, 151 cremation and 53 niches available. There are 6 more Wards that are currently open fields within the cemetery that are available to be developed and opened in the future for almost 3000 additional plots.
  - Over the past four years, the full burials have ranged from a low of 13 to a high of 27. Cremations have ranged from 18 to 30.
  - Based on these figures, there is little need to look for expansion beyond future planning for the development of the fields of the identified Wards within the cemetery property.
  - Annually, the Town contracts an arborist to assess the trees in the Cemetery to provide recommendations as to trimming, preservation, and replacement
    - The work that is provided is managed within the yearly budget
  - As future expansion is determined, the fields of the six planned Wards will require leveling, road pathways, and landscaping. There are few trees currently within these Wards, with any tree cover at the peripheries.
  - All additional plots, cremation plots, and Columbarium niches require advance registration and approval by the Registrar appointed for under the Funeral, Burial and Cremation Services Act on behalf of the Ministry of Government and Consumer Services.

# Primary Activities

## Primary Activities

*The Utilities Team is responsible for the Towns water/wastewater assets outside of the treatment plant.*

### Activities

#### Utility Network:

- The responsibility for the maintenance of the street-wide network for the supply of water, and sanitary and storm sewers are with a 3-person team (supervisor, two utility operators) within the Development and Operations team. OCWA operates and maintains the water and wastewater treatment facilities.
- The Utilities Supervisor and 2 Utility Operators/Labourers, plus the Utilities coordinator (from the Financial Services / Treasurer Department) maintain:
  - 50.3 kms of water distribution mains, 254 hydrants, 77 network structures, 338 valves, and 2,054 service lines
  - 36.6 kms of wastewater mains (35.3 kms are gravity mains), 62 network structures, and 1,704 service lines
  - 32.8 kms of stormwater mains, 719 catch basins, 18 discharge points, 8 network structures, and 944 service lines.
- The key performance indicators are monitored for reporting reliability, safety, availability and responsiveness of the system. There are established targets for no water breaks, zero wastewater backups or emergency repairs to wastewater infrastructure, and no events of pond overflow or collection main failure events resulting in downstream flooding or stormwater backups.

#### Activities:

- Activities are a combination of routine and/or scheduled events, water meter services, service requests/repairs, and utility locates.
  - Scheduled events include Lift station inspections for flow and test of alarms, cleaning and painting, hydrant flushing, water tower inspections
  - Water meter services include assembly of the meter by the utilities team, delivery to home builders/contractors for installation, inspection of meter connection prior to service, review of high usage locations, meter replacements
  - Service Requests/Repairs include checking catch basins for blockages, curb and catch basin repairs, backups and water main breaks, storm and sewer main maintenance, camera inspections of back-ups on resident properties, bulk water filling, responding to system alarms
  - Locates are required when excavating to install fences, repair driveways, plant trees, etc. Locates are more active during construction season.
- Administratively, the following activities are primarily handled by the Utilities coordinator:
  - Bi-monthly water and sewer billing
  - Inquiries, investigate questionable billing/usage, reconcile month-end billings/receivables/payables with Town General Ledger, match revenue with clearing account
  - Customer receivables/collections/disconnects, as well as payment plans

# Primary Activities

## Primary Activities

*The Town's Development and Operations staff have had considerable involvement in many capital projects completed by the Town.*

### Activities

- In addition to the operational activities of the Development and Operations Department, staff are involved in various capital projects to support the Town. Stakeholders indicated that these activities have been increasing in recent years. Involvement in capital projects would be in addition to the scheduled and regular operational activities completed by the Department.
  - Examples of these include the development of the Town's Dog Park; tennis/pickleball court; community garden; and splash pad at Greenwood Park. Staff involvement has ranged from general labour/construction to beautification projects to general contractor/project management.
- In some cases, Town staff involvement in capital projects may represent good value and utilization of Town resources. However, a heavy reliance on Town staff to complete capital projects has implications which include a likely reduction in service levels provided to ongoing operations. Additional, Development Charges allocated to capital projects generally cannot be used to offset operational staff time, whereas they can be used to fund third-party contractors. Further analysis of staff time is required to fully understand the scope of involvement in capital projects and impact on other operational requirements.

# Structure of Team

## Team Structure

*The current structure of the Development and Operations Team differentiates utilities and operations staff; but does not identify specific parks/recreation operators.*

### Findings & Observations

#### Development and Operations Organization

- The Development and Operations Department includes a Director, Manager of Operations, Parks & facilities; and two Supervisors (Operations and Utility)
  - This structure effectively results in two work groups –
    - Operations and Parks, which includes the Manager of Operations, Parks & Facilities; Supervisor Operations; and operators, labourers, clerk
    - Utilities, which includes a supervisor and two operator/labourer staff.
      - OCWA provides third-party management and operation of the Town’s water/wastewater treatment facilities
  - The Manager of Operations, Parks & Facilities, supervisor and staff have responsibilities for Roads and Winter Control activities; waste and leaf collection/Town appearance; special event support; and parks and recreation activities
    - See proceeding section for detailed description of activities

#### Operations staff are not differentiated between Parks and Roads, nor are job activities or hours of operation

- The current structure of the team results in roles and responsibilities for Operation staff that blend traditional “parks” and “roads” activities.
  - For example, staff job descriptions have both parks and roads activities; hours of operation also emphasizes traditional public works/roads hours and do not fully reflect park and recreation utilization (i.e., requirements for evening and weekend working hours).
  - There is also no differentiation for Utility Labourers, despite unique working environments; job duties; and training/qualifications.

### Implications

- Structure of the Operations team does not support the scaling up of parks and recreation services (should the Town decide to continue adding services), or does it easily facilitate future planning for Roads or Parks and Recreation activities.
- Structure of the Operations team may not support/align to resident expectations with respect to the timing of service delivery, particularly related to parks and recreation services (i.e., without the need for overtime or hours scheduled outside of normal schedule).
- With tasks for staff balanced between Roads and Parks activities, team members are often moved from one activity to another which can impact the concentrated efforts / skill requirements expected from the differing activities.

# Structure of Team

## Team Structure

*Within the Operations team of the Development and Operations group (i.e. excluding utilities) an estimated 25%-35% of staff effort is allocated to Parks activities.*

## Findings & Observations

### Development and Operations – increasing focus on Parks and Recreation

- The Development and Operations Department consists of:
  - 1 FT Director
  - 1 FT Manager of Operations, Parks, and facilities
    - 1 FT Operations Supervisor
      - 6 FT Operator/Labourers
      - 4 Winter Seasonal Contracts
      - 5 Summer Seasonal Contracts
      - Summer Students (18 week contract)
    - 1 FT Operations, Parks, and facilities Clerk
    - Custodial Services Attendant
    - 1 FT Utilities Supervisor
      - 2 FT Utilities Operator/Labourer
- The team is provided support by the FT Utility Coordinator and the FT GIS Coordinator from the Financial Services Department
- As of this draft, the Project Review team is still exploring whether timesheet level data is available for the Development and Operations team. This analysis would support an enhanced understanding of the time spent/utilization of staff across activities defined as: Parks and Recreation; Roads and Public Works; Special Events, and Utilities. As a proxy analysis to support this, the team has reviewed labour expenses identified in the Town's annual budget to determine level of effort at these activities. Preliminary analysis suggests that within the "Operations" team of the Development and Operations Division (i.e., not including Utilities staff); the division of labour costs is approximately 25%-35% to Parks and Recreation (Parks Labour and Cemetery Labour), with 65%-75% allocated to Roads and Public Works (Works Admin Labour and Works Winter Control Labour).
  - Of note, the ratio of Works/Winter Control labour to Parks/Cemetery Labour has been increasing in favour of Parks in recent years. In 2020, approximately 25% of labour costs were allocated to Parks/Cemetery, compared to an approved budget of 35% in 2022.

## Implications

- The increasing allocation of labour costs towards Parks activities, when viewed with relatively stable staffing levels in the Operations team suggests that more time/staff focus is being directed to Parks and Recreation activities than in recent years. Given the stable staffing levels, this may suggest a reduction in time/focus spent on other Roads/Public works activities. This is in alignment with findings described above regarding increased involvement in parks and recreation activities for this team.
- Additional analysis on timesheet level data would allow for further conclusions to be drawn – including an analysis of the seasonal shift between activities.

# Structure of Team

## Team Structure

*The Director of Development and Operations has a large scope of responsibilities with work volumes (largely as a result of Town growth) that make it difficult to effectively provide direction in all areas.*

## Findings & Observations

### Workload and Scope of Responsibilities for Development and Operations Director

- As noted on the previous slides, the Department has a FT Director who reports to the Town's CAO. The Director is responsible for overseeing Parks and Recreation activities; Public Works (road, street lighting and signage, etc.), utilities (water/waste water delivery and oversight of OCWA contract); and development activities.
- Given the growth rate of the Town, this is a large portfolio of activities for a single Director.
  - The Town's Parks and Recreation Master Plan will identify new activities and requirements for the Department to action
  - The Department is involved \$26M-\$34M Water Pollution Control Plan (WPCP) project
    - Project Cost Estimates per 2022 Adopted Budget
  - The volume of permit applications and necessary review is expected to increase as an additional 300+ homes in the Fieldgate development come online. The County MCR has stated growth targets which are anticipated to result in sustained development pressures for the Town
- Recently, to provide support to the Director, the Manager of Operations Parks & Facilities has been 'informally' reporting to the CAO.

## Implications

- The Town has reached a size and level of activity in service delivery where it has become every difficult/inefficient for a single resource to have oversight of public works, infrastructure, parks, recreation, and community services.



# Structure of Team

## Team Structure

*There is currently no formal role or process in place for supporting the large scope of responsibilities and workload of the Supervisor during vacations, absences, etc.*

### Findings & Observations

#### Scope of Responsibilities Supporting Operations Supervisor

- The Operations Team currently does not formally have staff or processes in place to support the responsibilities and workload of the Supervisor. As a result, the Operations Supervisor has a large scope of responsibilities without a primary support/backup staff member. This causes concern when the Supervisor has scheduled time off or is unavailable. There is a requirement to have the right mechanisms in place so that the role can be shared when needed e.g., appropriately trained and knowledgeable staff can continue activities during vacations and absences.
- Additionally, it is not currently clear that the Operations Team has the capacity to provide this support to the Operations Supervisor. In other words, there is likely a need for an additional one or more staff to allow the Operations Team to support these responsibilities with training appropriately provided for planning work schedules for the team, project planning, and budget input.

### Implications

- The Town may need to formalize a role to support the Operations Supervisor, however unless the Operations Team has the resource (staff) levels to provide this support, it is not clear that effective support would be achievable.

# Structure of Team

## Structure of Team

*The Development and Operations staff have identified concerns with respect to the availability of HR support; policies and procedures governing compensation for staff have not been reviewed in a number of years and may not be aligned with practices in peer municipalities.*

## Findings & Observations

### HR Policies and Hours of Operation and Compensation Currently under review

#### Hours of Operation and Compensation

- A policy is in place for Operations staff related to on-call compensation. This policy stipulates compensation for the staff assigned to carry standby phone at six (6) hours regular pay for each Saturday and Sunday. The policy provides standby compensation during the winter season for fulltime employees designated to be on call during the winter season at three (3) hours regular pay for each Saturday, Sunday or Statutory Holiday. This is not applicable to contract employees.
- *The Town is currently conducting a compensation market review (the Ward and Uptigrove Report) which will address issues noted in staff interviews including: The Standby Compensation Policy, Shift Premiums, wage premiums for specific technical qualifications or certifications held by staff, and Standby and On Call Policy.*

#### Training and Onboarding

- There is limited documentation for new hires to support their understanding of the group's operations, workflows, and processes. Training and onboarding documentation that exists is focused on health and safety requirements/understanding. Training and onboarding for day-to-day activities is primarily completed by experienced staff demonstrating processes to newer staff.

#### Policies, Procedures and Process Documentation

- Across both the Operations and Utility teams, there appears to be limited formal documentation of policies or procedures for required activities (e.g., road surface repairs; leaf collection; utility locates; bulk water fills).

## Implications

- Review compensation policies/practices to neighbouring communities and/or communicate compensation decisions to staff – which is a focus of the 2022 Market Check with the Town's HR/Compensation consultants.

# Structure of Team

## Structure of Team

*The Development and Operations staff have identified concerns with respect to the availability of HR support; policies and procedures governing compensation for staff have not been reviewed in a number of years and may not be aligned with practices in peer municipalities.*

## Findings & Observations

### HR and Performance Reviews

- Based on discussions with staff, it is not clear that there is a strong understanding of the performance review/appraisal process. Performance expectations, beyond what is described in staff job descriptions are also not well understood.
- Staff also do not have (or are unaware) of their designated contact for HR related matters.
  - This is aligned to General findings from the Fall 2021 SDR Report for the Town of Shelburne which identified capacity limitations to the Town's existing HR capacity (i.e., HR activities were not sustainable for the already high-utilized Town Hall Team) and recommended an HR Coordinator Role. It is understood that this role has been approved for a 2022 Q4 start. This should provide the resourcing necessary to begin addressing HR concerns in the Development and Operations Department.

## Implications

- Opportunities to enhance the reward and recognition of the Development and Operations staff should also be explored to ensure a high-level of morale among these critical employees.
- A full review and relaunch of the Town's Performance Review / Appraisal processes for Development and Operations should be an early priority for the new HR Coordinator.

# Team Processes & Workflow

## Team Processes & Workflow

*The Town's implementation of Citywide should generally viewed as a positive direction; with the Town well suited to continue enhancements with the implementation of additional functionality.*

### Findings & Observations

#### Citywide Implementation

- The Town has recently implemented Citywide into operations. Among the features provided by Citywide is the ability to support electronic workflows for service requests and work orders for the operations team. The initial implementation has generally been viewed as positive, with the team receptive to reducing paper requirements throughout the Town's processes and activities, providing a formal mechanism for responding to resident inquiries, enhancing the speed at which work orders can be processed, and allowing for electronic reporting/record keeping of activities. There is also recognition that the implementation has taken a phased approach, with priority activities and features the first to be brought online. Moving forward, next step observations included:
  - Enhanced functionality to support patrol activities and inspections – including vehicle breadcrumbing (tracking of vehicle progress on routes); enable electronic logging of inspections such as playground inspections with automated checklists, uploading of pictures, etc.
  - Integrate with/use to replace other tools used for Operations activities – for example the process for tree maintenance (tree removal, stump removal, replacement) involves both Citywide and excel based planning and tracking; information input not Citywide does not flow electronically to the Town's vendor for street light maintenance.
  - Ongoing training/support for the team to ensure the accurate and timely use of Citywide – i.e., closing out activities and tasks
  - Enhanced use for tracking activities and completed schedule of day-to-day to provide better insights into time requirements for activities and support KPI reporting and tracking
  - Currently, staff are not able generate service requests when in the field (i.e., if they identify a service need while completing other activities). This requires the team to call the Supervisor or Utility/Operations Clerk to generate a service request and action in Citywide.

### Implications

- Momentum gained from the successes associated with initial implementation of Citywide should be capitalized on to continue with 'next phase' enhancements and refinements to how the Town uses Citywide. This may include review and prioritization of options identified in Findings and Observations

# Team Processes & Workflow

## Team Processes & Workflow

*The Town has developed the foundational enablers to support a scalable process for addressing resident inquiries. Existing timesheet and time tracking processes for staff are very paper-based and do not support analysis on the utilization of staff time.*

### Findings & Observations

#### Resident Inquires

- Through the Town's website, residents are able to report concerns or complaints that are related to the Development and Operations Department (i.e., potholes, sewer backups, concerns with park conditions, etc.). The Operations, Parks, and Facilities Clerk is also able to answer phone calls from residents and provide appropriate customer service. This promotes a coordinated point of access for resident concerns. The Town's Citywide System allows for the electronic generation of work orders and for the team to prioritize actions, assess and document the situation, and report on actions taken/resolution of the situation. This allows for the Town to track activity and identify trends, as well as provide information for a follow-up with the resident where requested.
  - The Town is reviewing the current configuration of tools and resources to enable a preferred workflow. Once reviewed, this process should be formally documented, and staff trained such that it is followed consistently.
  - While consideration needs to be given to processes for after-hour emergency calls from residents, effort to direct non-urgent resident complaints/requests away from direct calls to the Operations supervisor or other staff and through the formal mechanism should be promoted.

#### Timesheets and Time Tracking

- The Development and Operations staff currently complete paper timesheets by hand. These are reviewed by the Supervisor and entered into the Town's financial system for payroll purposes. This review and entry also acts as an approval process by the Supervisor. While the Supervisor should approve timesheets, manual entry may not be an effective use of their time (depending on alternative options for electronic timesheet entry).
- More significantly, the current system of capturing timesheets and time allocation for each full-time and part-time staff is that there is limited ability to create reports/analysis on time spent against specific activities or tasks.
  - This prevents analysis on historical time allocations that could be used for forward looking planning.

### Implications

- The existing paper-based timesheet records limits the ability to conduct analysis of staff utilization across Development and Operation activities easily or in real-time.

# Team Processes & Workflow

## Team Processes & Workflow

*There appears to be limited documentation of onboarding processes for new hires or of the common and repeated activities completed by the Development and Operations Department.*

### Findings & Observations

#### Utilities

##### **Locates**

- Utility locates represent a significant time requirement for utility staff. This activity was described as very reactive based on customer requests.
  - *Note – pending availability of data, an analysis on the specific time requirements for utility locates will be conducted during the next phase of the engagement to estimate the resourcing significance of this activity*
- Staff indicated that there is an expectation that the volume of utility locates continues to increase/remains high as pressures to ensure installation of fiber optic cables and other critical infrastructure continues into the future.
  - There is also a liability consideration associated with utility locates as the Town bears responsibility for incorrect information provided as part of a utility locate.

##### **Bulk Water Fills and Backflow Prevention**

- The Town provides bulk water fills as a service. This is completed using mobile equipment connected to Town hydrants (i.e., as opposed to a dedicated bulk water filling station). This process requires the use of a backflow device to prevent any contamination entering the water system.
  - The backflow prevention equipment requires inspection and testing to ensure it is operating correctly. Discussions with staff indicated that this inspection is to occur each time the device is connected to a water source. However, the Town may only be conducting this inspection on an annual basis, and not each time the device is connected to a new water source and used.
  - Inspecting and testing the backflow prevention equipment requires additional specialized equipment and training. The act of conducting the inspection and test would require an estimated additional 30-minutes for bulk water filling.
  - It was noted that the new Water Tower will be operational by December 2022. With this installation, bulk water fills will be serviced via dedicated bulk water equipment and connections to hydrants will no longer be required.

### Implications

- Onboarding of new employees may not provide a comprehensive overview of the Department. This may result in additional 'back-and-forth' with new employees and trainers. It may also delay the new employee's ability to work independently.
- Opportunity to more formally document procedures, processes, and SOPs for key tasks to ensure consistency in execution; better support training activities; and ensure requirements are met.
- If the Town continues with bulk water fills using mobile equipment, there may be a need to ensure compliance with backflow prevention requirements for bulk water filling to ensure the Town is in compliance and that there are established and updated SOPs for this activity. There is an opportunity explore the ability to incorporate the cost of this testing into the cost of bulk water filling.

# Team Processes & Workflow

## Team Processes & Workflow

*The Town's Utility team is involved in the time-consuming activity of assembling water meter kits delivered by the Town's water meter vendor. It may be possible to remove the Town from this activity so that staff can focus on other value-add activities.*

### Findings & Observations

#### Utilities (continued)

##### Water Meter Kits

- Currently, the Town orders water meters and required accessories for developers and homeowners requiring new or replacement water meters (at a cost charged to the developer/homeowner). Water meters are supplied by *Wamco Waterworks and Municipal Products*. The water meters are shipped to the Town, where the Utility team assembles the meters so that they are ready for installation and delivers them to the developer/homeowner. The developer or homeowner is responsible for the installation of the water meter with an inspection conducted by the Utility team.
  - This represents a time-consuming activity for utility staff
  - The final assembly of the water meters could be completed by developers or the homeowner (via licensed and qualified plumber). This would remove the Town as a “middle-man” in this process and allow staff to focus on more value-added activities.
- Town staff also described situations where developers identify damaged water meters after they have been delivered by the Town. However, these were often identified well after delivery of the water meters making it difficult to determine if damage occurred as a result of Town activities, or during storage of the water meters at the development site.

##### Occupancy Notification

- Occupancy permits are not shared from the County's planning/building group. This document is key to identify accounts and start the billing process. With the amount of new development in the area, it is a challenge for the Utilities Coordinator to be continually checking whether a property is active, and billing should be enabled. This also concerns new apartments that may require separate metering.

### Implications

- Exploring options for reducing the Town's involvement in water meter assembly could support workflows for other activities including utility locates, and scheduled activities such as hydrant flushing, facility cleaning, inspections and reporting, backups, camera inspections, etc. This would also reduce the Town's involvement in damage issues for meters.
- As the Town completes water meters for new developments currently planned, it is anticipated that the majority of new water meter requirements will shift from new developments to replacements of old or inoperable meters. Assembly of these meters is less predictable and not typically completed in bulk (i.e., it is a less efficient activity to complete compared to bulk assembly of meters ordered for a large development).
- Without knowing when a building is approved for occupancy, utility billing can be delayed and can have financial impact to the Town.

# Team Processes & Workflow

## Team Processes & Workflow

*The Town's road and sidewalk network is increasing – this will increase time and resource requirements for winter control activities; however opportunities may exist to reduce time requirements for routes through pre-deployment/storage of sand for easier refilling of equipment.*

### Findings & Observations

#### Public Works and Roads

##### Winter Control – Deployment of Materials

- The Town currently stores its trackless sidewalk tractors (used for snow clearing on sidewalks) at the Town's 420 Victoria Street facility. Road plow trucks are stored at the 124 Luxton Way yard. Material for surface application (i.e., sand) is also stored at both locations for use in winter months.
  - With the anticipated sale of the 420 Victoria location, the trackless sidewalk tractors will need to be relocated, with the 124 Luxton Way yard the most suitable storage location at this point (note – see Equipment, Tools & Technology, Vehicles and Facilities Section for findings related to the utilization of facilities).
- Currently, there are two routes for road and sidewalk clearing activities used when responding to winter events. These routes require an estimated 7-9 hours to complete. During this time staff will refill vehicles with sand 4 times over the course of the route. This can take upwards of 40 minutes (per refill) to complete when staff are traveling from the northern parts of the Town to the Luxton Way Yard.
  - A sand storage depot/location more centrally located in the Town would reduce travel time for crews completing sidewalk clearing. This could include temporary storage facility at a central location such as Greenwood Park.
  - An alternative option could be for staff to deliver surface material to crews; however, this would require additional staff involvement.

##### Increase in the Size of the Town's Road and Sidewalk Network

- The Town is currently responsible for 74 lane KM of roads and 31 KM of sidewalks. Addition of Hyland Village and Fieldgate Homes developments will add 9.5KM of lane KM and over 3 KM of sidewalks. An increase of 13% (roads) and 10% (sidewalks)

### Implications

- As the Town continues to bring new roads online with new developments, finding efficiencies throughout the network will be critical. Time spent refilling sand may currently represent 2-2.5 hours out of an 8-hour clearing route. Reducing travel time for crews refilling sand, for sidewalk clearing alone, by half it could result in upwards of 60-90 minutes time saving per route.



# Team Processes & Workflow

## Team Processes & Workflow

*Grass cutting represents the largest requirement of staff time for summer months. There may be opportunities to reduce contractor costs for this area; the potential development of a permanent Crick Pitch may represent considerable ongoing expenses for its maintenance.*

### Findings & Observations

#### Parks, Recreation and Special Events

##### Grass Cutting Efficiencies and Service Expectations

- As noted above, grass cutting (and playground inspections) are logged via manual entries in a paper binder. These are written up in field and are subject to weather conditions. This can lead to damaged and/or lost records of key activities in the Parks.
- Grass cutting of approximately 1,568,516 square feet, represents the largest staffing requirement for summer months (this is expected given the nature/volume of work, and in alignment with other municipalities). Currently, the Operations team has a schedule for regular grass cuts for Town property. This schedule is not however based on service standards, nor is performance against this schedule reported on a regular basis. The adherence to the schedule is not easily known by the Operations team – this limits analysis and decision-making abilities regarding operational efficiencies.
- Currently, the Town uses an external vendor to cut the playing surface of the soccer fields at Greenwood Park. Town staff visit the park on a regular basis to cut all other grass throughout the park (including the areas directly outside of the playing surface).
  - Based on discussions with staff and department management, there does not appear to be any specialized equipment or processes used by the vendor (aside from comments regarding the irrigation sprinkler heads); nor is there a different service level/standard for the playing surface (aside from comments regarding the irrigation sprinkler heads). Town staff are also responsible for cutting playing field surfaces at other park locations across Town.
  - Note: The review team is awaiting detailed information on the contract specifics associated with this vendor activity to confirm the above findings and support a financial analysis of this activity.
- In recent years the Town has responded to resident expectations to support the establishment of a Cricket Field. The Town has consulted with other municipalities (specifically Brampton) for good practice on the maintenance of Cricket Fields. Maintaining these fields is generally a more resource intensive exercise and costly requirement compared to amateur soccer fields.
  - At a summary level, these fields require additional rolling, seeding and cutting.
  - The central playing area (pitch and wicket area) is either an artificial surface (concrete/aggregate base with artificial turf) which requires servicing twice per year (power sweeping, compacting the surface) or natural grass which requires daily rolling and cutting to 0.125". This represents a very labour-intensive activity.
  - The outfield playing area requires cutting 2-3 times per week to maintain a grass length of 0.5"-0.75". The seeding requirements (and costs) for this are also increased – estimated at three times those costs for a soccer field cut at 2".

### Implications

- Grass cutting on recreational parks and sports fields is the largest component of staff requirements over the summer months. Without the full recording and reporting of these activities, the Town is not able to optimize or look for efficiencies in this area beyond subjective reviews.
- The use of a vendor to support grass cutting at Greenwood Park may represent an inefficient use of Town resources, and an opportunity to consolidate work into the Operations team given the Operations team already conducts the majority of grass cutting at the park and assuming responsibility for the playing surface would represent an incremental increase in total time spent cutting grass at the park (i.e., 30-40 minutes per cut cycle).
- Additional analysis is required to determine an accurate estimate of the costs associated with maintaining a Cricket Field. This should also consider opportunities to explore partnerships with community groups to share in the work effort associated with maintaining a cricket field.

# Team Processes & Workflow

## Team Processes & Workflow

*Many of the services performed by the Development and Operations Department do not have service standards which can be used to communicate and monitor service levels in support of managing resident expectations.*

### Findings & Observations

#### **Parks, Recreation and Special Events (Continued)**

##### **Gaps in Service Standards for some Maintenance Activities**

- There appears to be a gap in service standards related to tree trimming/maintenance and winter maintenance in parks. The absence of these standards has resulted in some situations where it was described that the Operations team is required to make ‘judgement calls’ on activities in response to resident complaints. It may also lead to difficult situations for staff when communicating with residents without a formal service standard in place to assess specific situations. Examples of these include trail maintenance activities – where expectations and requirements are not well defined; and maintenance of winter ice rinks where the Operations team makes every effort to ensure ice surfaces are well maintained. However, the team is often required to prioritize other activities (i.e., road and sidewalk clearing) over ice rink clearing during winter months. There is a lack of documented standards for staff to use in justifying and communicating these decisions.

##### **Non-Monetary Donations Policy**

- Currently, there is no policy for non-monetary donations to the Town (i.e., trees, flowers, benches, etc.). As new parks come online (i.e., Dog Park), there is a tendency for residents and community groups to provide non-monetary donations to finalize these facilities. While such donations can be valuable and beneficial to the Town, they must be carefully planned, and accepted in ways that do not place unnecessary burden on long-term sustainability. For example, a donation policy should clearly outline the items, locations, and processes for donating non-monetary assets. The intent should be to ensure the future commitments for the Town to maintain good upkeep of the donation is viable (which is of high relevance to the Operations Team), and that donations are aligned to the needs of the Town (i.e., they align with site plans).

### Implications

- Tree trimming and inspections are another area of high staffing requirement and having established service standards provide staff with the guidelines to properly estimate and turn staff attention to these service requirements.
- A winter maintenance service standard for facilities in parks will also reduce the frequency of queries or complaints / support in the response to these regarding upkeep of ice rinks or trails during the winter season. This may also represent an opportunity for increased/formal use of volunteer groups/interested residents to participate in appropriate park maintenance activities.

# Team Processes & Workflow

## Team Processes & Workflow

*The Town also does not have a Fields Allocation policy to support staff (and the community) in assuring the most appropriate allocation of playing field and park resources across the community. The process for booking facilities is also time-consuming for staff, involving the review and entry of information into multiple systems*

### Findings & Observations

#### Parks, Recreation and Special Events (Continued)

##### Fields Allocation Policy and Booking Process and Contracts

- The Town does not have a Fields Allocation Policy in place today. Allocation policies are used by municipalities to manage the demand and supply of municipal facilities – including outdoor playing fields and park space. Without a Fields Allocation Policy in place, there is no formal policy for allocating the use of park facilities to individuals, groups, or leagues. There is no formal prioritization of user groups (i.e., Town programs, Community Service Organizations (children and youth, seniors, adults, etc.) residents, commercial groups, non-residents, etc. There is also not clarity on the provision of services-in-kind by the Town to support organizations booking facilities.

##### Facility Booking Processes and Contracts

- The Town has made advancements in moving much of the field/facility booking process for parks and recreation online to enhance customer service/accessibility (note: facility and ice-time booking for CDRC is not in the scope of Town services). However, the process for updating the availability schedule has been described as cumbersome and time consuming by staff. Following a booking request by a resident, staff must manually: update the online calendar to reflect the revised availability; input the booking into the software currently used by the Town to track the booking (Keystone); and inform the Operations team of the booking. Despite an increase in recreational facilities, the Town does not have a dedicated recreation management tool (such as Perfect Minds) to support the end-to-end booking management process.
- Related to the booking of facilities, there is also some uncertainty regarding appropriate fee structures and booking times. For example, sports fields are booked based on a “game” or “event” – this results in staff estimating the length of these activities, and in cases such as using the field as a cricket pitch, no fee is listed for that activity. Additional clarity would reduce assumptions and promote transparency to residents.

### Implications

- Staff are not able to follow a guide to provide residents (individuals and/or groups) direction when booking fields or park facilities. While general first-come-first-served and grand-fathering league event schedules are accommodated, there are often issues at time of booking resulting in resident complaints or vocal concerns.
- Staff are involved in what were described as inefficient processes for Town operated facility bookings, with unclear standards regarding standard booking times and associated costs. The Town is approaching the size where clearly defined processes are required to enable an efficient facility booking process, and potentially supported by software solutions. This finding should be considered in close alignment to the missing Fields Allocation Policy.

# Equipment, Tools & Technology, Vehicles and Facilities

## Equipment, Tools & Technology, Vehicles and Facilities

*The Town is moving towards a reduction in the available yard/work space for the Development and Operations Team. There is some concern about the resulting work/storage conditions for the team and equipment. Initial discussion on a yards plan appears to have begun, but more formalized direction is required.*

### Findings & Observations

#### Workspace and Yard Facilities

- Prior to March 2020, the Development and Operations team worked out of the 124 Luxton Way site. The 420 Victoria Site had been in the process of decommissioning in advance of a planned sale of the property. As a result of COVID-19 requirements for increased physical distancing, the Utilities team relocated to 420 Victoria Road.
- Today, the Development and Operations works out of these two primary locations: 420 Victoria Road and 124 Luxton Way. The Victoria Road location is used primarily by the Utility team for storage (equipment and vehicle) and as a workspace, with Operations also storing equipment there – most notably trackless sidewalk tractors for winter control activities and for sand storage during the winter.
  - As the Town is committed to selling this location, the Utility team has been re-locating to the 124 Luxton Way facility to use as a workspace (e.g., for the assembly of water meters, etc.).
- Space limitations associated with the 124 Luxton Way facility have been identified by the Development and Operations team that may need to be addressed long-term:
  - The Luxton Way facility currently has a main building with a small office space suitable for shared use by 2-3 manager/supervisor; small lunch/break space and lockers; 3 bay garage storage (suitable for the Town's largest plow trucks; and a mezzanine level workspace.
  - The yard also has covered salt/sand storage for winter control and 2-3 shipping containers used for storage of summer maintenance equipment (mowers, etc.).
- Staff indicated that additional facilities across the Town are also being used to store equipment and supplies
  - Hyland Park (340 Gordon Steet) where the Town owns a large shed and is frequently used by the Operations team to store supplies and equipment
  - Water Tower – used by Utilities team to store supplies and equipment
  - Shelburne LTC (Robert Street) where the Operation team stores the Town's Christmas decorations.

**(Continued on next slide)**

### Implications

- The 124 Luxton Way facility appears to have limited ability to accommodate new activities/storage needs given current size limitations.
- The Operations and Utilities teams are currently utilizing storage locations across Town in an opportunistic and ad-hoc way. While there is often value to decentralizing the storage of some equipment and supplies (i.e., to reduce the potential of a single point of failure), this needs to be well coordinated and within the right conditions (i.e., to support workflows, enable proper storage of equipment/materials).

# Equipment, Tools & Technology, Vehicles and Facilities

## Equipment, Tools & Technology, Vehicles and Facilities

*The Town is moving towards a reduction in the available yard/work space for the Development and Operations Team. There is some concern about the resulting work/storage conditions for the team and equipment. Initial discussion on a yards plan appears to have begun, but more formalized direction is required.*

### Findings & Observations

#### Workspace and Yard Facilities (continued)

- Based on observations and discussions with staff and leadership, once the Town has disposed of the Victoria Road facility, the Development and Operations team will require more space than is provided by the current Luxton Way facility. The following concerns were identified:
  - The facility does not have enough indoor storage space for all winter control equipment (road and sidewalk) which may result in a need to store equipment outdoors – this could have negative impacts on the time/speed required to ready vehicles in winter conductions and additional maintenance needs/risks
  - The Utility team is required to carry water meter equipment up and down staircases on a regular basis which may pose a fall/trip hazard
  - Break space and locker storage for the staff is very limited – currently there is not enough locker space for all employees. There is also no access to shower facilities for staff (given nature of this team’s work, such facilities are good practice).
- The Town is in the very early phase of exploration for expansion to the 124 Luxton Way yard. It is currently understood that no formal decisions or commitments have been made.

### Implications

- A formal Yard Strategy / Workplan is likely required to clearly outline the requirements for the 124 Luxton Way facility and investments required. This should consider the current, and anticipated staffing complement; vehicle and equipment storage; and workspace facilities.

# Equipment, Tools & Technology, Vehicles and Facilities

Equipment, Tools & Technology, Vehicles and Facilities

*The Town appears to be moving in the right direction with a focus on adopting value-add technology to reduce manual and paper-based processes; improve customer self-serve functionality; and supporting performance monitoring.*

## Findings & Observations

### Technology

- As noted on previous slides related to the Development and Operations department processes and workflows, the Town is committed to improving the use of technology through its operations.
- Examples of positive improvements with respect to the use of technology include:
  - Adoption of GPS tracking tools for winter control vehicles. This technology helps to ensure the Town is tracking performance against Minimum Maintenance Standards and can be used to generate reports on activity if required
  - Implementation of Citywide to support work order system. As described above, this implementation is a positive step in reducing manual and paper-based activities.
- With respect to limitations, the paper-based timesheet entry activities represent opportunity for enhancement and the existing software used to support parks and recreation is not optimized for the requirements (i.e., requires manual entry and offers limited customer self-serve functionality as described above).
- **Software and Services used by Development and Operations:**
  - Citywide is used for Asset Management and includes facilities, fleet, equipment with varying levels of detail
  - As noted elsewhere, Citywide is used for Work Orders. Utilities and facility bookings are currently completed through Keystone. Initial planning is underway to transition additional processes for utilities to Citywide
  - ESRI Arch GIS is licensed through Dufferin County
  - Tallysman software from Five9 Solutions is used for the GPS monitoring of winter control vehicles
  - Traffic Logix equipment is used for traffic calming applications.

## Implications

- Technology adoption and modernization efforts will need to continue across the Development and Operations group. Prioritization of high-value tools will need to occur to ensure the best allocation of resources.



# Equipment, Tools & Technology, Vehicles and Facilities

Equipment, Tools & Technology, Vehicles and Facilities

*The Development and Operations Department is responsible for fleet management of its own vehicles and equipment; it was noted that there is increasing focus on a robust fleet asset management practice to ensure the good upkeep and replacement of vehicles.*

## Findings & Observations

### Vehicles and Equipment

#### The Fleet:

- The combined fleet for the Development and Operations team consists of:
  - 13 vehicles – 8 Pickup Trucks, 3 Plow Trucks, and 2 Backhoes ranging in age from model year 2003 to current
  - 47 pieces of equipment – including trackless snowblowers and tractors, compact and utility tractors, riding mowers and mower attachments, line painter, compact excavator attachments, asphalt hot box, sanders, power sweepers and rakes ranging in age from model year pre-2000 to the current year.
- A loader is rented for winter months as it is only needed to support the loading of sand into plow trucks.

#### Fleet Activities:

- The Development and Operations team primarily perform annual summer maintenance, winter vehicle preparation, and light maintenance duties. This includes:
  - Daily winter vehicle maintenance on winter snow vehicles and equipment
  - Annual summer maintenance of washing, greasing and oil changes
  - Annual winter equipment preparation including truck plow and trackless machine preparation
- The Town does not have a staff position for a certified mechanic and uses third-party suppliers to provide larger maintenance and repair service, typical for a Town of this size.
- The Town does allocate funds to reserves for future equipment purchases (\$50,000 in 2022 Budget). However, it is not clear that this is tied to the value/replacement value of equipment and/or replacement schedule. Staff noted that discussions regarding opportunities to reduce the carbon footprint of the Town's fleet/public works vehicles have been discussed, but to date have not been considered viable. While this may be the case today, there is not a clear understanding of what would be viable for the Town with respect to electric vehicles (i.e., size, use, ROI requirements, etc.).
- The Town has developed a plan to identify and work towards energy conservation and demand management for building facilities (2019 Energy Conservation and Demand Management Plan Framework).

## Implications

- No issues impacting the quality of service delivery as a result of the available equipment were identified by staff. Moving forward as the Town continues to enhance asset management practices, allocation of reserves should be guided by specific equipment replacement needs.

# Communications, KPIs, and Outcomes

## Communications, KPIs, and Outcomes

*The Town should continue to direct inquires, complaints, and requests to formal customer service channels and support a high-degree of understanding regarding operations work activities among Members of Council.*

### Findings & Observations

#### Communication

- The Town maintains an FAQ guide on its website, which along with the Department specific webpage provides a good level of information on key activities completed by the Town (road surface repairs, snow clearing, tree maintenance). These represent common questions/sources of inquires by residents across many municipalities.
  - The FAQ page is not currently highlighted/linked from the “submit complaint” online form – modifying this page/linking to the FAQ page from the complaints page may support some residents in better understanding Town activities and reducing resident misunderstanding resulting in complaints.\*
  - There is also not a clear process for reviewing trends in resident complaints/inquires that could be addressed through the Town’s website as enhancements to the FAQ page. The Town can also take advantage of existing web presence (YouTube, social media channels) to post regular updates on Town activities or video explanations of processes and activities (i.e., how the Town conducts line painting, etc.).

#### Council Orientation

- Members of Council will receive complaints and requests from residents and businesses directly. While these should be directed to the Town’s official processes and channels, members of Council also have an opportunity to support resident education regarding Town processes and standards.
  - Members of Council are provided with overviews and orientation to Town operations (by Clerks Department). This is a good practice that provides the opportunity for enhancements based on specific questions/comments frequently raised by Members of Council.

### Implications

- The Town should continue to maintain the FAQ webpage and consider enhancements and additions where necessary based on inquiry trends.
- Providing Council with good orientation material (including written material that can be referred to at any time and facility tours) can assist members of Council in discussing with residents regarding activities completed with respect to all Town services.

\*Note: During the course of this review, the Town updated it’s website to link the Compliant Page and FAQ Page. This was completed as a quick-win in fall 2022.



# Communications, KPIs, and Outcomes

## Communications, KPIs, and Outcomes

*Across all areas of the Development and Operations Group, there is limited use of KPIs or data to support transparency on performance or ongoing decision making.*

### Findings & Observations

#### Limited use of KPIs

- Across the activities completed by the Development and Operations Department there are limited examples of KPIs or service standards in place (for activities related to roads, utilities, parks and recreation). The notable exception is the monitoring of winter maintenance activities against Ontario's minimum maintenance road standards; and indicators related to the Town's Asset Management Plan for Bridges, Culverts, Roads, Stormwater, Wastewater, Water to meet requirements associated with Ontario Regulation 588/17.
  - Without the collection and tracking of KPIs, the Town is also not currently able to report with certainty on activities or performance of the Development and Operations Department
- Historically, the Town has likely been limited in the ability to efficiently collect and report on KPIs due to the reliance on manual and paper-based processes. However, the Town's commitment to technology implementation (including Citywide) presents an opportunity to leverage enabling systems to establish reporting practices (note – this finding was expanded upon at a Corporation wide level in the Town's Fall 2021 Service Delivery Review).

### Implications

- The absence of KPIs and service standards limits the Town's ability to communicate performance and set expectations with residents and businesses
- Without established KPIs and service standards it is difficult for the Town to assess performance value for investments.



→ Review of Development and  
Operations Department

## 4. Jurisdictional Findings

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# Jurisdictional Selection

Three comparable municipalities have been identified for the purpose of understanding and learning about practices used in other municipalities.

- Informed by the key comparator criteria and other key factors, the following municipalities have been selected for analysis and comparison: *Town of Orangeville, Town of Collingwood, and the Town of New Tecumseth.*

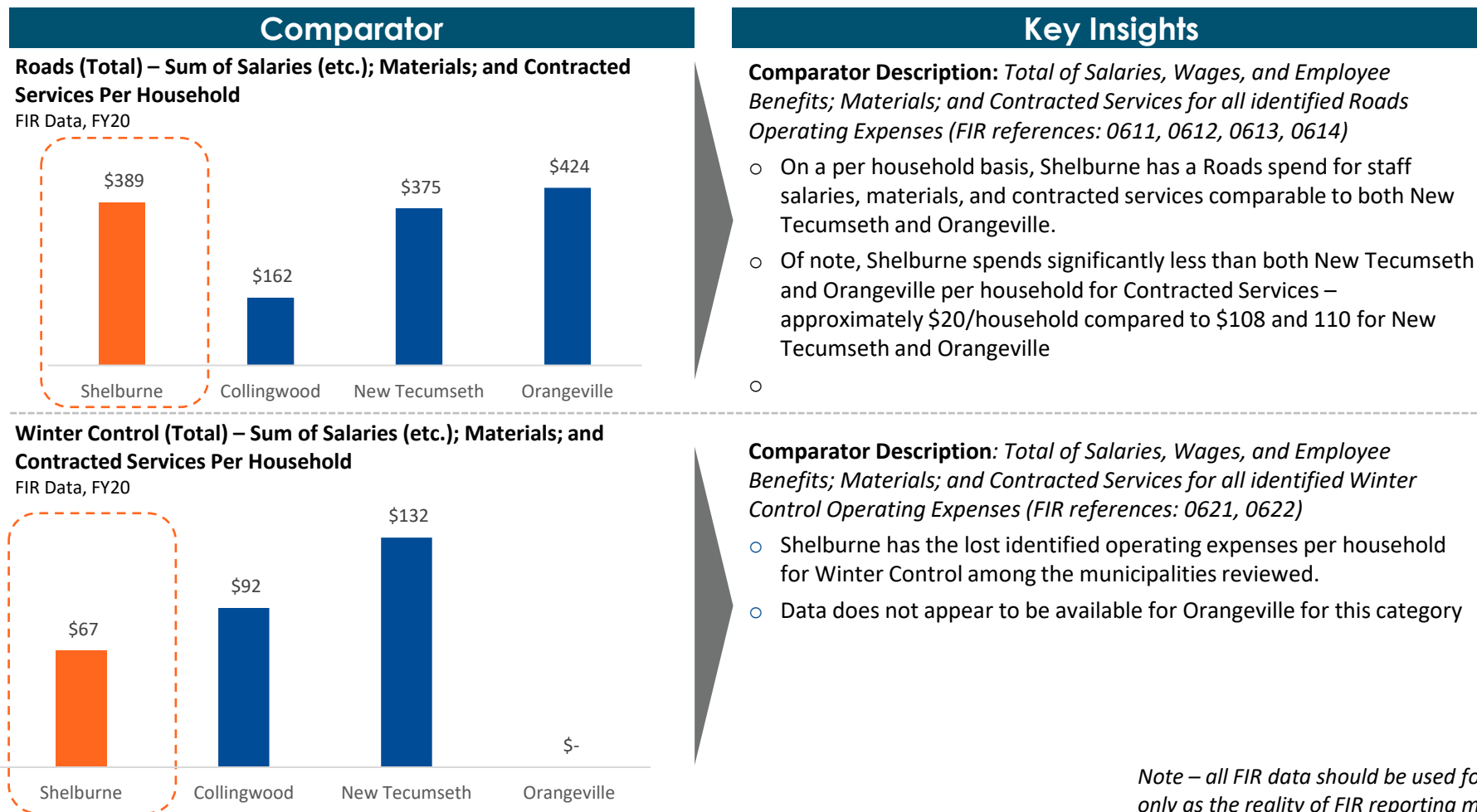
Attribute	Shelburne	New Tecumseth	Collingwood	Orangeville
Population Size	8,994	43,498	24,811	30,225
Population Density	1,371/km <sup>2</sup>	161/km <sup>2</sup>	748/km <sup>2</sup>	1,990/km <sup>2</sup>
Households	2,904	16,249	13,216	11,153
Land Mass	6.56 km <sup>2</sup>	274 km <sup>2</sup>	33 km <sup>2</sup>	15 km <sup>2</sup>
5-Year Population Growth Rate (2016-2021)	11%	28%	14%	4.5%
County	Dufferin	Simcoe	Simcoe	Dufferin

Source: Statistics Canada. Census Profile, 2021 Census of Population.

<https://www12.statcan.gc.ca/census-recensement/2021/dp-pd/prof/search-recherche/lst/results-resultats.cfm?Lang=E&GeoCode=35>

# Jurisdictional Selection

The Town of Shelburne has a per household operating expense for Winter Control below comparator municipalities; and a roads spend in line with comparator municipalities.



1. Source: 2020 Financial Information Return data for Shelburne, Collingwood, New Tecumseth, and Orangeville

*Note – all FIR data should be used for directional insights only as the reality of FIR reporting may result in slight differences in accounting for program and staff costs across municipalities.*

# Jurisdictional Selection

The staffing complement for Shelburne (Public Works + Parks activities) appears to be relatively smaller on a per household basis compared to peer municipalities - this is in alignment with general findings from the Fall 2021 SDR for the Town of Shelburne

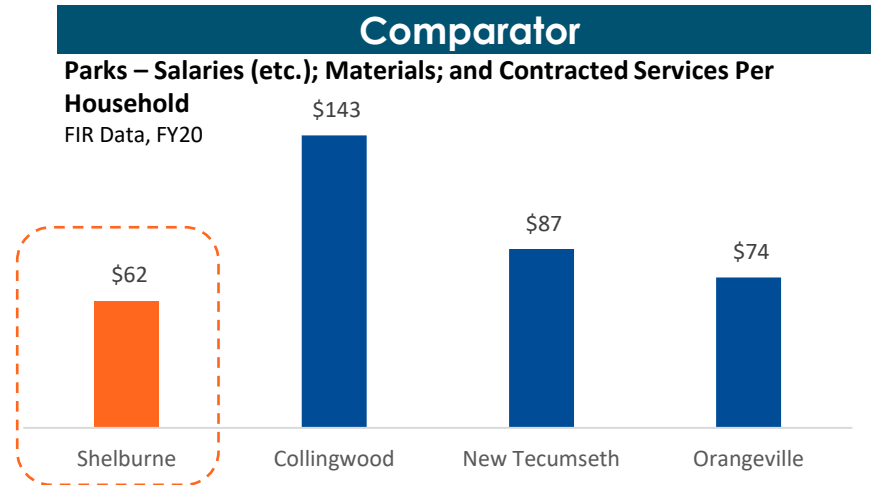
- Shelburne has a comparable percentage of lane kilometers in good or very good condition when compared to the comparator municipalities.
- When public work Full-Time Funded staff positions, Shelburne has the highest ratio of households to staff member at 323. In other words, there is a single Full Time staff member for ever 323 households; compared to Collingwood which has a single Full Time public works staff member for ever 188 households.
  - Further, each of the comparator municipalities have full time funded positions for Parks. Shelburne's Park related activities are supported by the identified Full Time Public Work Staff.
- While FIR Staffing figures should be considered with caution due to staff fluctuations, this does suggest a workforce that is comparatively smaller per household compared to the municipalities reviewed.

Indicator	Shelburne	New Tecumseth	Collingwood	Orangeville
<b>Percentage of paved lane kilometres where the condition is rated as good to very good</b>	78%	75%	81%	70%

Comparator	Shelburne	New Tecumseth	Collingwood	Orangeville
<b>Households per Identified Public Work Full Time Staff</b>	323	226	188	310
<b>Households per Identified Parks Full Time Staff</b>	-	503	307	429

# Jurisdictional Selection

The Town of Shelburne has the lowest per household operating expenses for Parks – slightly lower than Orangeville and 43% of Collingwood.



**Key Insights**

**Indicator Description:** *Total of Salaries, Wages, and Employee Benefits; Materials; and Contracted Services for all identified Parks Operating Expenses (FIR references: 1610)*

- On a per household basis the Town of Shelburne has the lowest operating expenses (salaries, benefits, materials, contracted services) compared to peer municipalities.
- Note – while Shelburne has no dedicated Parks staff identified in the FIR (see previous slide); Public Works (Operations) staff conducting Parks activities have those wages, materials, and contracted services allocated to Parks cost centers.

1. Source: 2020 Financial Information Return data for Shelburne, Collingwood, New Tecumseth, and Orangeville

*Note – all FIR data should be used for directional insights only as the reality of FIR reporting may result in slight differences in accounting for program and staff costs across municipalities.*

# Jurisdictional Review – Team Structure

Three comparable municipalities have been identified for the purpose of understanding and learning about practices used in other municipalities.

Attribute	Orangeville	Collingwood	New Tecumseth
Department Alignment including Roles and Activities	<ul style="list-style-type: none"> <li>Two separate departments: <ul style="list-style-type: none"> <li><b>Community Services</b> Includes the Facilities and Parks division (parks, trails, and facilities) Includes the Recreation and Events division (recreational programs and public events)</li> <li><b>Infrastructure Services</b> Includes the Public Works division (maintenance of roads, water supply and distribution system, and sewage collection and treatment)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Two separate departments: <ul style="list-style-type: none"> <li><b>Public Works, Engineering and Environmental Services Department</b> Responsible for road maintenance operations including snow removal and winter maintenance of roads and sidewalks.</li> <li><b>Parks, Recreation &amp; Culture Department</b> Culture &amp; Events Division: special events, galleries, museums etc. Facilities Division: Arenas &amp; rinks, aquatic centre, curling club and other municipal recreation sites. Parks and Recreation Division: parks, trails, harbour and horticulture and forestry.</li> <li>Separate 'Water Services Department'.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Two separate departments: <ul style="list-style-type: none"> <li><b>Parks, Recreation and Culture Department</b> Facilities; parks and trails; community events; day camps; museum and heritage etc.</li> <li><b>Public Works Department</b> Responsible for Water and Wastewater; Roads; Plowing; Sanding and Salting; sidewalks etc.</li> </ul> </li> </ul>

# Jurisdictional Review – Hours of Operation / KPIs

Three comparable municipalities have been identified for the purpose of understanding and learning about practices used in other municipalities.

Attribute	Orangeville	Collingwood	New Tecumseth
<b>Recreational Facilities Hours of Operation</b>	<ul style="list-style-type: none"> <li>Website page shows different recreational facilities, but hours only mentioned for a few: <ul style="list-style-type: none"> <li>Outdoor skating rink: 9am-8pm</li> <li>Splash pad: 10am-7pm daily</li> <li>For other services, the hours included are: 24 hours daily or Other.</li> </ul> </li> <li><a href="https://parks.orangeville.ca/?CategoryId=52303%2C42095&amp;FacilityTypeId=&amp;Keywords=&amp;ScrollTo=google-map-trigger&amp;CloseMap=true">https://parks.orangeville.ca/?CategoryId=52303%2C42095&amp;FacilityTypeId=&amp;Keywords=&amp;ScrollTo=google-map-trigger&amp;CloseMap=true</a></li> </ul>	<ul style="list-style-type: none"> <li>Hours of operation for the Culture &amp; Events and Parks and Rec Division: 8.30am-4.30pm</li> <li>Recreation Service Advisor, Monday - Friday, 8:30 a.m. to 7:00 p.m., or Saturdays, 8:30 a.m. to 2:00</li> <li>Public Washrooms available year-round.</li> <li>Portable toilets also available</li> </ul>	<ul style="list-style-type: none"> <li>Website has a list of all parks and facilities, but the hours section is left blank: <a href="https://facilities.newtecumseth.ca/?mid=10556&amp;ScrollTo=facilityResultsContainer&amp;Page=6">https://facilities.newtecumseth.ca/?mid=10556&amp;ScrollTo=facilityResultsContainer&amp;Page=6</a></li> <li>Outdoor Rink is open 9:00am-10:00pm.</li> </ul>
<b>KPIs, Measurements or SLAs</b>	<ul style="list-style-type: none"> <li><a href="#">Town has a Strat Plan (2017-2020)</a> this outlines objectives and action items; it does not include implementation and outcomes.</li> <li>Town is working on a Strat Plan that to be finalized in 2023: <a href="https://www.orangeville.ca/en/town-hall/strategic-plan.aspx">https://www.orangeville.ca/en/town-hall/strategic-plan.aspx</a></li> <li>Strat Plan Progress Report 2021: <a href="https://www.orangeville.ca/en/town-hall/resources/Documents/2021%20Strategic%20Plan%20Progress%20Report-FINAL-21-08-10-web-acc.pdf">https://www.orangeville.ca/en/town-hall/resources/Documents/2021%20Strategic%20Plan%20Progress%20Report-FINAL-21-08-10-web-acc.pdf</a></li> </ul>	<ul style="list-style-type: none"> <li>Town has a <a href="#">Strat Plan (2020-2023)</a>— includes goals, objectives, and action items with timelines. No specific KPIs.</li> <li>Town also has a <a href="#">Parks and Rec Master Plan</a> that outlines programming and staffing for the department but no KPIs.</li> <li>The plan outlines the goal, recommended action, responsibility, timeframe and anticipated target or outcome.</li> </ul>	<ul style="list-style-type: none"> <li>Town Strategic Plan: <a href="https://www.newtecumseth.ca/en/town-hall/resources/Documents/2019---2022-Stat-Plan---Brochure-FINAL.pdf">https://www.newtecumseth.ca/en/town-hall/resources/Documents/2019---2022-Stat-Plan---Brochure-FINAL.pdf</a></li> <li>Mentions 'Measures of Success' will be included in annual progress reports.</li> <li>Annual progress report not available on website.</li> </ul>



# Jurisdictional Review – Facility Allocation Policy

Three comparable municipalities have been identified for the purpose of understanding and learning about practices used in other municipalities.

Attribute	Orangeville	Collingwood	New Tecumseth
<b>Facility allocation policy and prioritization of user groups</b>	<ul style="list-style-type: none"> <li>Page 318 of <a href="#">Recreation and Parks Master Plan</a> mentions a Facility and Venue Allocation Policy (March 20, 2017) and states that allocation is determined by balancing a number of factors based on user profile and function profile. Appendix G of <a href="#">this document</a> describes the user and function profile in more detail.</li> </ul>	<ul style="list-style-type: none"> <li>The Coordinator of Registration &amp; Permits is responsible for permitting all facilities and coordinating program registrations. <a href="https://www.collingwood.ca/culture-recreation-events/parks-facilities/parks-facilities-rentals">https://www.collingwood.ca/culture-recreation-events/parks-facilities/parks-facilities-rentals</a></li> <li>The Director of the Parks, Recreation and Culture Department developed a <a href="#">Facility Allocation Policy</a> in 2020 and put forward a request to seek approval from Council to adopt it. We do not have evidence that it was adopted.</li> <li>Facility allocations were prioritized by the following: <ul style="list-style-type: none"> <li>Municipal Programs</li> <li>Special Events &amp; Tournaments</li> <li>Minor Youth and other Non-profit Youth Organizations</li> <li>Major Town of Collingwood Teams</li> <li>Schools</li> <li>Adult Recreational Organizations within the Town</li> <li>All other Town user groups</li> <li>Non-resident groups</li> <li>Commercial Operations</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A Facility Scheduler is responsible for discussing the availability of the requested dates and times and rental requirements for the facilities. There is no allocation policy listed on the web site.</li> <li>The following facilities are included: <ul style="list-style-type: none"> <li>Halls:</li> <li>Rooms</li> <li>Ice pad and arena floor use</li> <li>Fieldhouse</li> <li>Gymnasium</li> <li>Fields, diamonds and outdoor spaces</li> <li>Seasonal Tottenham Conservation Area campsites</li> <li>Any rental that will have alcohol onsite</li> <li>Picnic Pavilion rentals that will have over 50 people in attendance</li> </ul> </li> <li><a href="https://www.newtecumseth.ca/en/parks-recreation-and-culture/facility-rentals.aspx#Policies-Procedures-By-laws">https://www.newtecumseth.ca/en/parks-recreation-and-culture/facility-rentals.aspx#Policies-Procedures-By-laws</a></li> </ul>

# Jurisdictional Review – Outdoor Facility Price Ranges

Three comparable municipalities have been identified for the purpose of understanding and learning about practices used in other municipalities.

Attribute	Orangeville	Collingwood	New Tecumseth
User Fee Considerations	<ul style="list-style-type: none"> <li>The Town of Orangeville has a variety of parks and facilities available for rent.</li> <li>Rental fees available online for the following facilities: <ul style="list-style-type: none"> <li>Ice rink, floor pad, sports centre, recreation centre, Town Hall, pool, parks, sports field.</li> </ul> </li> <li>Prices vary across facilities and within facilities based on duration of the rental. Full list can be found here: <a href="https://www.orangeville.ca/en/things-to-do/facility-and-park-rentals.aspx">https://www.orangeville.ca/en/things-to-do/facility-and-park-rentals.aspx</a></li> <li>Charges for recreational services: <a href="https://www.orangeville.ca/en/recreation/ice-and-floor-schedule.aspx#Public-Skating">https://www.orangeville.ca/en/recreation/ice-and-floor-schedule.aspx#Public-Skating</a></li> </ul>	<ul style="list-style-type: none"> <li>Rental fees are dependent on location, time of use and degree of public access <b>but doesn't state any prices.</b></li> <li>Detailed table of fees for Parks, Rec and Cultural programs listed in Section D of Fees and Service Charges document: <a href="https://www.collingwood.ca/sites/default/files/docs/2022_fees_and_charges_final_for_bylaw.pdf">https://www.collingwood.ca/sites/default/files/docs/2022_fees_and_charges_final_for_bylaw.pdf</a></li> </ul>	<ul style="list-style-type: none"> <li>New Tecumseth has a list of services and corresponding rental prices here: <a href="https://www.newtecumseth.ca/en/parks-recreation-and-culture/resources/Documents/Fees-Charges-Consolidated-to-Amendment-27-January-2018.pdf">https://www.newtecumseth.ca/en/parks-recreation-and-culture/resources/Documents/Fees-Charges-Consolidated-to-Amendment-27-January-2018.pdf</a></li> <li>It also has the Fees and Charges by-law document: <a href="https://www.newtecumseth.ca/en/resources/Finance/Consolidated-2022-006-Fees-and-Charges-By-law.pdf">https://www.newtecumseth.ca/en/resources/Finance/Consolidated-2022-006-Fees-and-Charges-By-law.pdf</a></li> </ul>

# Jurisdictional Review – Job Descriptions

Three comparable municipalities have been identified for the purpose of understanding and learning about practices used in other municipalities.

Attribute	Orangeville	Collingwood
<b>Job Descriptions - Public Works, Recreation, and Utilities</b>	<ul style="list-style-type: none"> <li>• Job descriptions available online only for current opportunities. <a href="https://orangeville.applicantstack.com/x/openings">https://orangeville.applicantstack.com/x/openings</a></li> <li>• Available for Facility Assistant, Facility Operator, Instructor/Guard (different levels) – all within the Community Services Department</li> </ul>	<ul style="list-style-type: none"> <li>• Job descriptions available online only for current opportunities. <a href="https://www.collingwood.ca/council-government/employment">https://www.collingwood.ca/council-government/employment</a></li> <li>• Available for Purchasing Coordinator, Engineering Technician, Truck Driver, Plans Examiner</li> </ul>

# Jurisdictional Review – Compensation

Three comparable municipalities have been identified for the purpose of understanding and learning about practices used in other municipalities.

Attribute	Collingwood
<b>Compensation, Allowances, Overtime, Call-In and Shift premium</b>	<ul style="list-style-type: none"> <li>• <a href="#"><u>Collective Agreement between the Corporation of the Town of Collingwood and Canadian Union of Public Employees and Its Local 1217</u></a> (May 2017 to April 2020)</li> <li>• <b>Wages and Allowances:</b> <ul style="list-style-type: none"> <li>○ The Corporation agrees to pay wages as they apply to job classifications.</li> <li>○ Employee on authorized <b>overtime</b> &gt; 3 hours will be provided with a meal allowance of \$13.00.</li> <li>○ The meal allowance will also apply when employees are called in 3 hours prior to their regular starting time or where an employee is required to work out of town.</li> <li>○ <b>Night Work:</b> In order to qualify for an hour's night work bonus, an employee must work at least 4 consecutive hours between 5:00p.m. - 8:00a.m. Bonus shall not apply to employees regularly scheduled to work between those hours</li> </ul> </li> <li>• <b>Overtime</b> <ul style="list-style-type: none"> <li>○ Authorized work performed in excess of the employee's normal work week or normal workday, and authorized work performed on Saturday will be paid at the rate of time and 1.5 of the employee's regular straight time hourly rate. Sunday overtime shall be paid for at double (2.0) time.</li> <li>○ <b>Call-In:</b> employee called in to work outside their regular scheduled hours shall be paid at the rate of 1.5 their regular straight time rate for all hours worked with a minimum of 3 hours pay at the time and 1.5 rate; except on Sundays where the minimum guarantee shall be 3 hours at double (2.0) time except to the extent that this three (3) hour period overlaps and extends into his/her regular shift, in which case the employee shall receive only time and one-half (1.5) for all hours actually worked prior to the commencement of their regular shift.</li> <li>○ The minimum guarantee of three (3) hours pay shall be applicable only for two (2) separate call-ins in any 24-hour period, and that for the third and subsequent call-in an employee shall be eligible only for time and one-half (1.5) for all hours actually worked or double (2.0) time where applicable</li> </ul> </li> <li>• Job classifications included in the collective agreement: student, custodian, truck driver/labourer, machine operator, mechanic, lead hand.</li> <li>• <b>Following employees paid a premium:</b> vactor truck, snowplough, sewer, winter patrol, arborist.</li> </ul>

# Jurisdictional Review – Compensation

Three comparable municipalities have been identified for the purpose of understanding and learning about practices used in other municipalities.

Attribute	Collingwood			
Wage Ranges	<b>Job Classification</b>	<b>1-May-17 <u>1.7%</u></b>	<b>1-May-18 <u>1.9%</u></b>	<b>1-May-19 <u>1.9%</u></b>
	Lead Hand	\$33.38*	\$34.01	\$34.66
	Mechanic	\$32.71**	\$33.33	\$33.96
	Machine Operator	\$29.55	\$30.11	\$30.68
	Truck Driver Labourer	\$28.76	\$29.31	\$29.87
	Custodian Temporary Labourer	\$25.57	\$26.06	\$26.56