



BLACKLINE
CONSULTING





A Higher Standard

Organizational Review – Final Report

Township of Tiny

11th January 2023

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/ CONTEXT



This report presents our recommendations for the organization of the Township of Tiny

In April 2022, The Township of Tiny (the Township or Tiny) selected Blackline to assist it to complete an organizational review

Tiny has been experiencing growth in demand for its services in recent years, stemming largely from expanding permanent resident population and more visitors to the municipality. However, the Township has not substantially increased its staffing levels to address the service pressures.

As part of planning for the future, the administration and Council hypothesized that the workload generated by rising demand may exceed the current organizational capacity, leading to service gaps and staffing issues. As a result, the Township elected to have an independent consulting firm conduct a review of organizational structure, staff complement, and roles and responsibilities.

This report represents Blackline’s final recommendations, developed following the process shown in the image to the right.

To synthesize our findings and recommendations, we met with each of the department heads, members of Council, and an external vendor (IT). We also held four group interviews with staff.



We grouped our findings into three themes as we developed recommendations




This report is structured around three main themes:

- Modernizing work practices
- Working for the whole
- Planning work and increasing capacity

Each section of the report contains a set of recommendations relevant to the overarching theme.

In presenting recommendations, we describe in detail the suggested course of action, as well as justification and findings that led to our conclusions.

The graphic to the right outlines the mapping of the three themes to the recommendations of the report.

	Description	Recommendations
<p>1</p>  <p>Modernizing Work Practices</p>	Streamline the Township's organization by using digital solutions and increasing organizational capabilities.	<p>1.1 Digitize services and processes</p> <p>1.2 Adopt a hybrid workforce model</p> <p>1.3 Enhance customer service</p> <p>1.4 Operationalize asset management</p>
<p>2</p>  <p>Working for the Whole</p>	Building a more flexible organization that considers the priorities of the Municipality as a whole	<p>2.1 Pool administrative staff</p> <p>2.2 Plan for continuity of operations</p> <p>2.3 Rebuild professional networks</p>
<p>3</p>  <p>Planning Work and Increasing Capacity</p>	These recommendations focus on understanding the impact of data and importance of tracking on an organization.	<p>3.1 Define methods for forecasting and tracking workload</p> <p>3.2 Define corporate approach to redirecting capacity to emerging priorities</p> <p>3.3 Add positions to manage workload</p> <p>3.4 Implement a future-looking organization</p>



/ MODERNIZING WORK PRACTICES

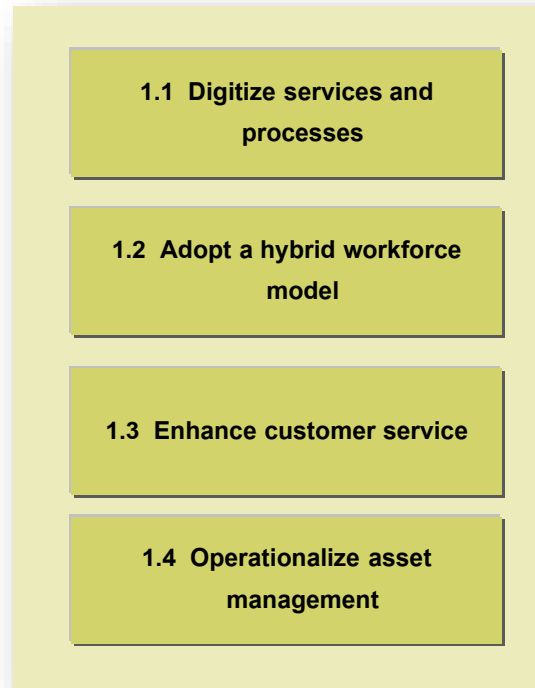
1. Modernizing Work Practices

Participants in our interviews and workshops indicated that staff may currently be employed at full capacity.

While adding more staff to increase service capacity may address short-term pressures, over the long-term, as population and service expectations continue to grow, Tiny will likely find itself at a similar precipice once again. As an alternative, we suggest that the Township reconsider how it operates to increase efficiency and use some of its existing resources in a more effective manner.

- ▶ COVID highlighted some of the possibilities of more modern practices, which the Township could permanently embrace.
- ▶ Modern practices should apply not just to how the Township gets work done but also to how it works with its customers.
- ▶ Hybrid working could help mitigate space limitations but is only achievable with more digital processes. Similarly, enhancing customer service, particularly in a hybrid work situation, will be significantly helped with more online services.

You should build a sense of continuous improvement while implementing these recommendations within the organization. Encouraging staff not to stop when these projects are complete but take the skills forward.



Relevance, impact

These four recommendations place a focus on Township's customers (i.e., residents, visitors), making access to services easier and reducing impediments staff may experience today.

- ▶ **Managing Growth** – the Township is experiencing a steady increase in its population. Through automation and innovative customer service strategies, the Township will be able to better manage this growth.
- ▶ **Waste Reduction** – through digitizing services and functionality within the organization, the Township will be able to reduce its manual processes and save time that could be spent in other, more productive areas.

1.1 Digitize services and processes

Recommendation

Automate manual, labour-intensive processes to increase efficiency

Identify processes that are candidates for automation, potentially incorporating:

- ▶ Applications and permits
- ▶ Resident service requests
- ▶ Internal approvals and workflow
- ▶ Procurement
- ▶ Record keeping

Consider assigning a set of responsibilities to a new position, with a remit of redesigning these processes, and, more broadly, advancing the digitization agenda of the Township.

Findings

The Township is currently undertaking a series of technology modernization initiatives aimed at improving access to services, streamlining internal processes and updating core systems. This effort, although productive in its individual initiatives, is reportedly lacking a holistic vision of how Tiny plans to digitally transform its operations and services. While an IT master plan is in place and Tiny's outsourced IT service provider is reportedly delivering to expectations, there is no role in the organization to guide the Township's digital transformation agenda. Particularly, the Township can focus on three areas of digital capabilities:

- ▶ **Digital Service Delivery Capabilities:** Residents' access to municipal services and tools through digital channels, including focusing on customer experience, user-centric design, and accessibility.
- ▶ **Internal Process Automation Capabilities:** Development of internal tools and practices that streamline operational work to digitize processes, minimize manual inputs, and automate routine tasks.
- ▶ **Data-Driven Decision Making:** Development of analytical capabilities for data gathering, analysis, and evidence-based decision making and policy design.

Interviewed participants commented on an increased demand for digital services and modernization

Staff suggest that the expectations of Tiny Township residents and visitors are evolving. Digital, mobile, and self-service capabilities that are becoming commonplace in larger municipalities are now expected to be the norm for smaller townships as well. This evolution in customer preferences requires a coordinated response. However, many departments are taking on digital modernization independently and without strategy. This is creating duplicate effort, amplifying a lack of integration and resulting in non-collaborative solutions.

1.1 Digitize services and processes

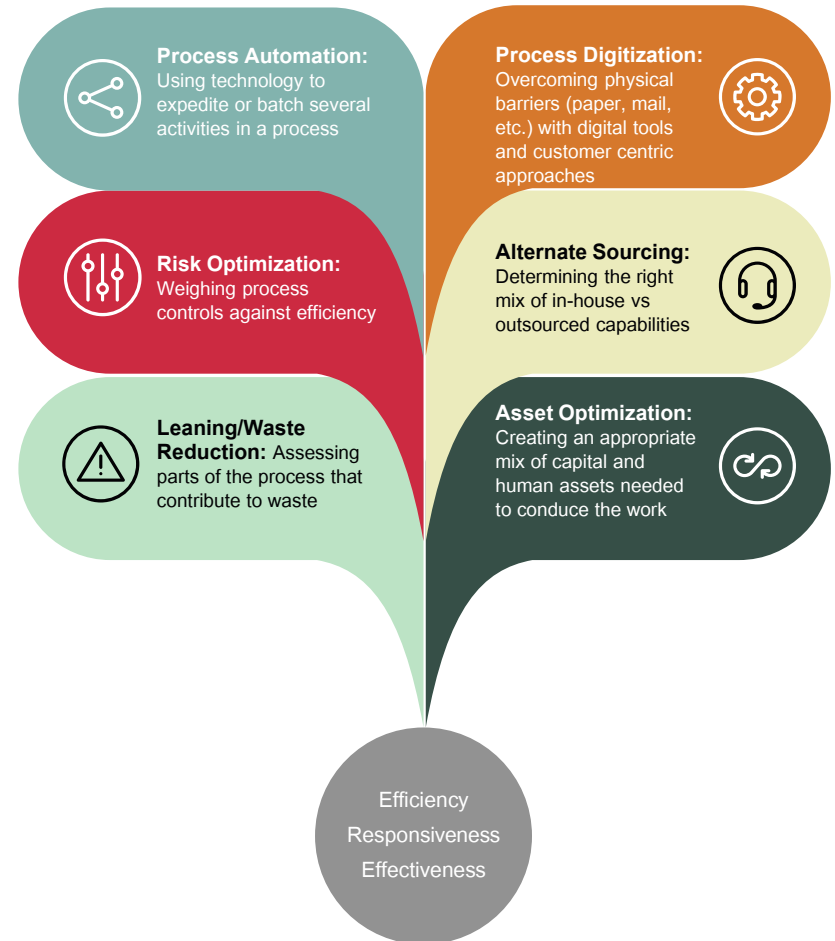
Go digital by default

While some efforts at streamlining processes have been made by the Township (e.g., Cloudpermit), further work in automation, simplification and digitization can be done. Workflows need to be constructed using person-centric design approach and focus on yielding outputs and outcomes in the most efficient manner. Particularly susceptible to efficiencies are processes that entail:

- ▶ Receipt and processing of end-user requests or resident information (**automate** data entry, **simplify** triaging of requests, **classify** and **redistribute** request types)
- ▶ Production of a municipal permit or record document (**digitize** the artifact, **audit** outcome vs. control process, **default** to digital record)
- ▶ Handoffs in accountability between units/departments (**improve** internal messaging and workflow, **promote** end-to-end accountability, **create** cross-functional teams)
- ▶ High-volume transactional activities (**create** process automation, **outsource** repetitive low-risk processes, **develop** shortcuts for multiple steps of a process)

We suggest the Township create a separate and distinct role dedicated to improving processes, digitizing work, and automating manual tasks across the entire service delivery landscape. Also, consider making Process Improvement a regular task in all Township job descriptions.

Process Improvement Levers Available to Tiny Township



1.2 Adopt a hybrid workforce model

Recommendation

Adopt a "tailored-to-Tiny" hybrid workforce model

Assess the impacts of Township employees working remotely on a role-by-role basis. Create a formal policy for roles with minimal or positive impacts to be delivered remotely (potentially offering tailored option to each employee). Provide adequate training for managers with remote roles/teams to effectively manage, engage, motivate, and develop their people.

In developing the hybrid workforce policy, consider the following:

- ▶ Impacts on office space and reimbursement of employees' home office expenses
- ▶ Management oversight processes
- ▶ Tools, equipment, and process digitization required by remote employees
- ▶ Impacts on recruitment and retention strategies
- ▶ Team cohesion and culture

Findings

This recommendation addresses two critical issues identified in this review:

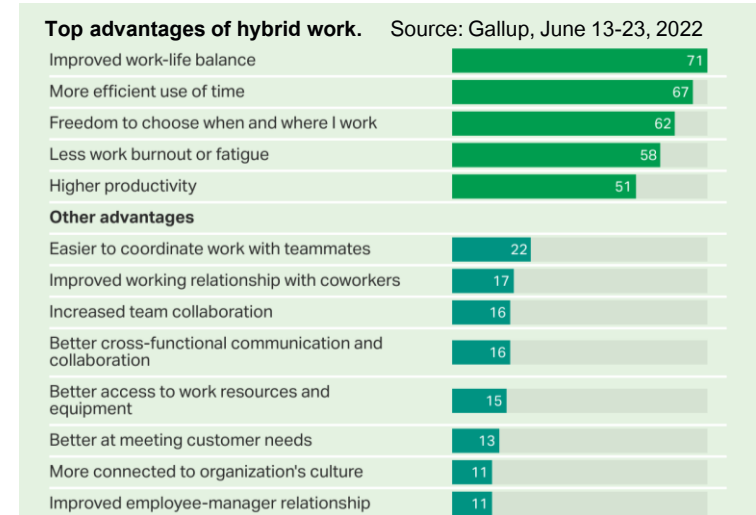
- ▶ **Increasing pressure on the physical office space of the Township.** Staff estimate that the current office space for the main building and the three portables is **15,260 sq. ft.**, with the portables representing 3,200 sq. ft. Using our layer analysis and applying the number of staff in each layer to the associated mid-point sq. ft., we estimate that Tiny needs **15,050 sq. ft.** to accommodate the current staff complement. As the Township grows, it will likely run out of available office space and will require either significant capital upgrades (i.e., new building, additions, renovations, etc.) or seeking new flexible options for staff on where and when they work.
- ▶ **Enhancing the Township's ability to attract, retain, and better utilize its human capital.** Tiny's workforce is its greatest asset, representing the majority of its budget and the totality of its outcomes. However, some Township employees report being overworked, underappreciated and disconnected from the rest of the organization. Furthermore, Tiny's ability to attract new staff for critical roles is hampered by a relatively small local labour market and remoteness from large urban centres. Flexible work options for staff could give the Township a boost in employee productivity and engagement and attract candidates not bound by the commute times into the office. Of particular importance in the recruitment strategy could be the ability to tap into a resource-rich GTA region for employees with municipal administration qualifications.

1.2 Adopt a hybrid workforce model

Rethink workforce deployment to focus on performance and outcomes, not inputs and line-of-sight management

The COVID-19 pandemic was a paradigm shift in how work gets done for every organization. Tiny Township was no exception, quickly pivoting to remote work for its employees and low-touch service delivery for its residents. Many lessons can be extracted for restructuring work and reimagining citizen access to township services. Particularly, drawing on hybrid work principles, the Township has the opportunity to:

- ▶ Optimize existing office space: the expansionary pressures for physical space would abate if a portion of Township employees work remotely permanently or on offsetting weekdays. For example, some Public Works employees can travel to work sites from home and arrive at the office only as needed. Similar approaches work for Building and Planning resources and administrative staff if processes are digitized.
- ▶ Attract talent beyond municipal boundaries and retain current talent: the recruiting pool for vacant positions would expand to include candidates that live beyond a reasonable commute time. Moreover, hybrid work has been shown to improve job satisfaction and reduce burnout (refer to the diagram on the right).
- ▶ Develop modern management practices: Line-of-sight managerial techniques (time tracking, work shadowing, etc.) could be complemented with more advanced approaches to boosting employee productivity (performance measurement of outputs/outcomes, virtual teams, remote-enabled workflows, regular check-ins, etc.)



The Township will also need to consider how to best address challenges that often arise when hybrid models are adopted:

- ▶ **Team collaboration and culture:** with distributed and virtual teams, management will need to elevate practices that lead to team bonding, cohesion and unity, and actively promote the desired culture.
- ▶ **Loss of productivity:** employee productivity may actually dip in a remote setting if core processes remain manual, paper-based and uncoordinated. As previously conveyed in this report, digitizing core processes is necessary to fully enable remote work.
- ▶ **Hybrid Tailored to Tiny:** the "in-office" vs. "remote" balance needs to be customized to the Township's work practices and objectives.

1.3 Enhance customer service

Recommendation

Develop a comprehensive strategy to enhance customer service

The Township has the opportunity to enhance its approach to serving residents through a new mix of channels, self-service tools, and staff competencies.

Intentional choices about how residents are served need to be made, using personalization, user experience, and citizen-focused service design approaches.

Funding and prioritization decisions should be informed by residents' preferences captured in the strategy.

Findings

Staff comments suggest a challenge within the Township with serving customers (residents and visitors) in a predictable, courteous, and responsive manner. The following aspects of providing quality customer service are relevant to the Township:

- ▶ **Channels:** Customer Service is stated to be the top priority in the Township's strategic plan. However, there is no channel strategy, with a related lack of channel migration goals or investment targets. In-person channel, for example, while almost non-existent in the COVID period, once again appears to be essential since residents started to come back to the municipal offices. However, it is the most expensive and time-consuming channel available, often acting as a barrier to modernizing work. Thus, an opportunity to actively migrate customers to self-service channels (web, mobile, phone, email, etc.) is being missed. While some counter-service presence may be required, there doesn't seem to be an explicit and intentional strategy on how customers are best served by the Township.
- ▶ **Access:** There is no singular "front door" for customer service in Tiny other than a physical reception space. Thus, residents who require service that may not be squarely in the domain of a singular department are left to navigate a web of department-specific (not issue or service-specific) contacts.
- ▶ **Training:** While customer service training was offered in January 2022, such opportunities appear to be ad-hoc and not institutionalized. Furthermore, the training was not targeted at municipal services.

1.3 Enhance customer service

To deliver on its top strategic priority, the Township needs to develop a comprehensive Customer Service Strategy

The current Township of Tiny Strategic Plan (2020-2025) lists Customer Service as the top priority for the Council. To deliver on this aspiration, the Township is advised to develop a Customer Service strategy, which at a minimum, should incorporate the following:

- ▶ **Customer service vision and objectives.** The strategy needs to outline what constitutes excellent service by the Township and the milestones it aims to achieve in advancing that vision.
- ▶ **Customer profiles and personas.** It is important to accurately capture the profiles of Tiny residents and visitors in order to create a strategy that suits their needs.
- ▶ **Customer touchpoints and journeys.** True reflection of how citizens want to be served is depicted by journeys/pathway they take in receiving Township services. The interfaces and engagement with the citizens should inform how services are delivered and how standards are set.
- ▶ **Mix of service channels to be employed by the Township.** While Counter and Phone channels have been the cornerstones of citizen interactions in the past, the Township needs to incorporate new and emerging digital/self-service channels into the mix.
- ▶ **Customer services key performance indicators.** The strategy needs to have a set of measurable activities and outcomes that are to be actively advanced by Township's staff. Continuous measurement and related service adjustments will ensure the strategy is achieving its goals.

How to develop a Customer Service strategy

- ▶ **Research your service recipients:** The development of a customer service strategy by the Township needs to follow a citizen-centred and community-informed approach. This includes sourcing content from Tiny residents on their expectations, preferences, and service consumption patterns. The strategy needs to highlight real user experiences and build customer service models that align with those experiences. Thus, citizen/user research should be a core input into the construction of the strategy.
- ▶ **Empower your staff:** It is critical to make the strategy a lifeblood of your organization at every level. Every customer interaction is a "moment that matters" for citizens and how it unfolds will directly influence the satisfaction level of service recipients. Thus, consider making most of your Township staff "Customer Service Representative" first and "functional expert" second (e.g., a Planner can become "Customer Service Representative – Planning". As an option, hardcode customer service metrics into each role in the Township. Train your staff with the leading customer service principles and approaches to help develop their skills and capabilities.
- ▶ **Use the strategy to make choices:** once the strategy is developed, ensure you continue to be guided by it to make choices on the allocation of funds, prioritization of issues, fine-tuning your culture, and rewarding and motivating employees. Over a longer term, seek to create holistic accountability for Customer Service with a dedicated executive portfolio.

1.4 Operationalize asset management

Recommendation

Operationalize planning, construction, and maintenance of Township assets throughout their lifecycle

Identify the requirements for new asset management tools to better:

- ▶ Track assets
- ▶ Maintain assets
- ▶ Collect data
- ▶ Create reports
- ▶ Integrate with other systems

Consider establishing an Asset Management Coordinator role. This role will be responsible for managing all Township's assets and strategizing asset forecasts.

Policies governing standardized asset management may be adopted along with the Asset Management Coordinator role.

Findings

Demand for enhanced asset management processes is increasing.

Asset management legislation is changing

- ▶ With new provincial legislation requiring municipalities to manage their infrastructure through asset management planning (AMP), Tiny needs to strengthen the ways it is inventorying, servicing, funding, and accounting for its assets.
- ▶ Asset Planning: The Township will need to adhere to the provincial timelines to create the plan for 2024 and 2025 deadlines.
- ▶ Asset Management Processes, Resources, and Tools: Tiny's current systems and capabilities are reportedly underdeveloped, requiring investments to meet provincial regulations. Work is progressing on this.

Interviewed participants commented on the lack of uniformity within the asset management process

Staff suggest there is a gap in resources within departments to move forward with asset management requirements, despite having a budget for an Asset Management Coordinator.

- ▶ There is a question of whether or not the utilization of staff and resources is as effective as it could be. As asset management is becoming a critical capability in all municipal organizations, it is imperative that Tiny catch up to the expected industry standards.

1.4 Operationalize asset management

There is currently a budget for an Asset Management Coordinator, who will help with the process.

However, there is a question pertaining to where the coordinator should reside.

- ▶ Most municipalities position asset management within their Public Works or Finance departments.

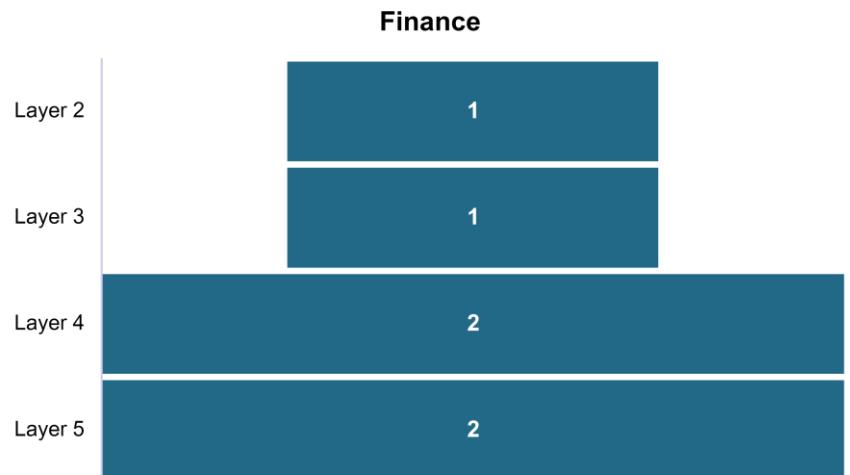
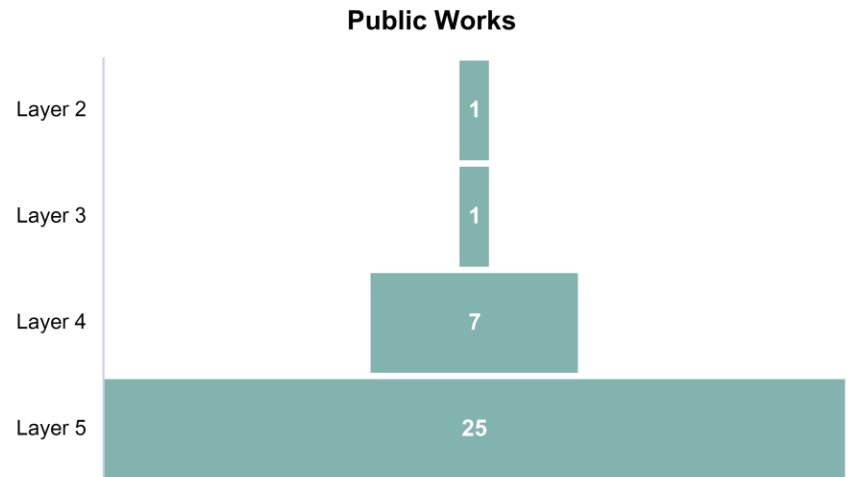
For Tiny, it is more structurally sound to place the Asset Management Coordinator under Finance, based on the Township's current organizational structure

- ▶ The graphs to the right illustrate the current spans and layers for both the Finance and Public Works departments.
- ▶ Finance has the capacity to take on this potential new role given its current layer structure.

The Township's asset management is currently siloed

Standardization within asset management practices should be considered to keep up with industry trends.

- ▶ Therefore, accompanying the onboarding of the Asset Management Coordinator should be standardized policies for recording and managing assets organization-wide.
- ▶ The Township may consider going to market for an asset management system, which could automate some of the processes.





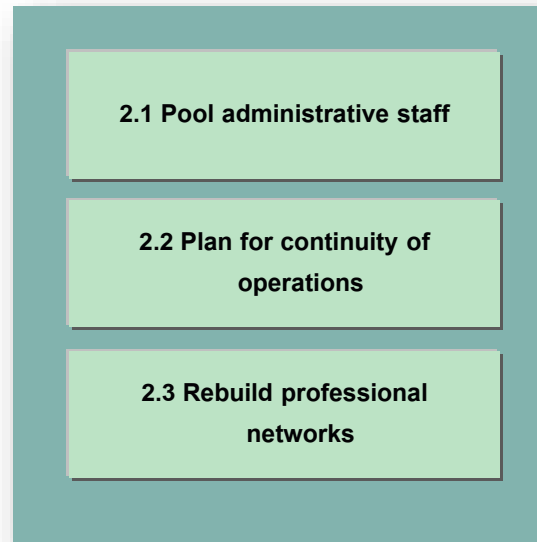
Then send it to the back

/ WORKING FOR THE WHOLE

2. Working for the Whole

Our analysis suggests that departmental structures are hindering the Township's ability to flexibly allocate resources to the areas of greatest need

Staff are primarily focused on the mandate of their respective department and their own role within it, often at the expense of the enterprise as a whole. Such allegiances tend to effectively advance departmental objectives, but in doing so, they may forgo broader opportunities to collaborate and solve complex customer issues. The Township is advised to seek ways to break down organizational silos and improve collaboration across departments.



Relevance, impact

These recommendations can help move the culture towards thinking more about the Municipality as a whole and increasing the flexibility of a smaller organization.

2.1 Pool administrative staff

Recommendation

Extract administrative staff from the various departments and create a pool to serve the whole Municipality

This change does not affect the administrative capacity of the Township; rather it makes it more accessible for all staff and creates flexibility.

A structured approach would include:

- ▶ Defining the current administrative services and services levels
- ▶ Confirming the feasibility of centralizing the roles
- ▶ Developing methods for staff to access administrative services
- ▶ Cross-training administrators over time

Findings

Interview participants commented on the administrative support model being inflexible

Dedicated administrative assistants only serve their own department and are unable to supplement other areas due to not being cross-trained, not having visibility workload, and exhibiting allegiance to a home manager.

- ▶ This results in an inability to rapidly redirect existing administrative capacity to the areas of greatest need within the organization. This may be due to variability in workload or because of an absence.
- ▶ Some areas of the Municipality do not have direct access to administrative support.

COVID has shown that administrative staff do not need to be collocated with the staff they support to be effective.

- ▶ With the hybrid work model suggested in this report, the administrative pool can certainly function so long as the required technology is available to staff.

2.1 Pool administrative staff

Combining some or all administrative resources into a common pool can create a more flexible function

We identified six staff in the organization that have the title of Administrative Assistant.

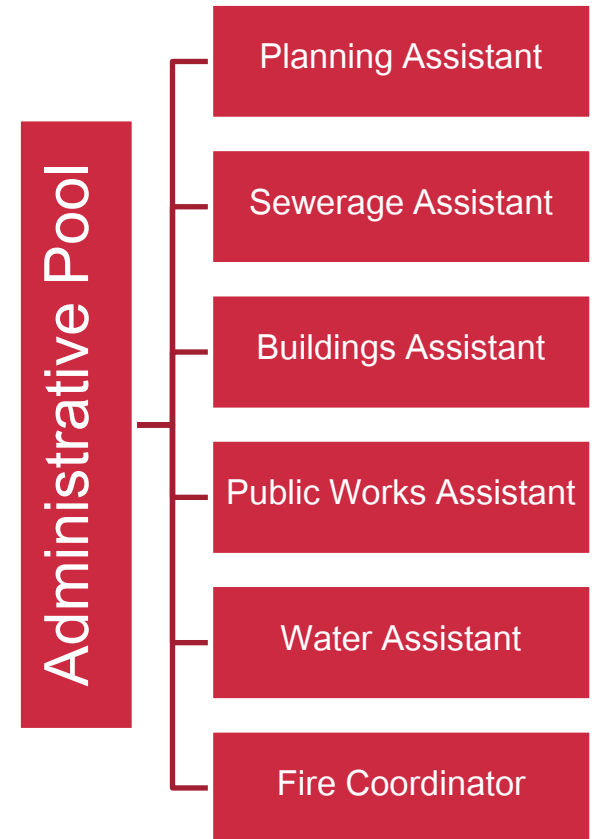
- ▶ Under the pooled structure, staff would collaborate with a group of administrative assistants, headed by a supervisor, who triages and allocates the work.
- ▶ To function effectively as a pool, the team would need to cross-train on the more departmental-specific items. So this function would evolve over time.
- ▶ Highly technical work currently performed by dedicated assistants may still remain with some specialized resources in the pool. However, some capacity of those individuals would need to be allocated to serving as back-ups to their peers or responding to urgent Township-wide priorities.

This change does not affect the administrative capacity but will offer three benefits

- ▶ Better ability to manage peaks and valleys in administrative work from the departments.
- ▶ Better coverage for absences.
- ▶ Gives all staff the same level of access to administrative support.

The departments that currently have administrators may lose some control over the priorities of their legacy administrative assistant. However, retaining some role specialization may mitigate this issue, while expanding the township's access to all available administrative resources.

- ▶ Shifting to the new model will necessitate inventorying and assessing the nature of administrative work that is performed today. Delineation of "specialized" vs "generic" assistants may be required, coupled with a transparent triaging of administrative requests. Additionally, escalation protocols and priority-setting governance mechanisms will help the pooled structure operate more effectively.



2.2 Plan for continuity of operations

Recommendation

Develop a plan for cross-training of key positions and for supporting succession of staff

Such a plan should clearly identify positional coverage, complementary roles, career paths, developmental expectations, and training opportunities.

Findings

Interviews suggest the Township struggles at times to cover certain roles when they are sick or on vacation

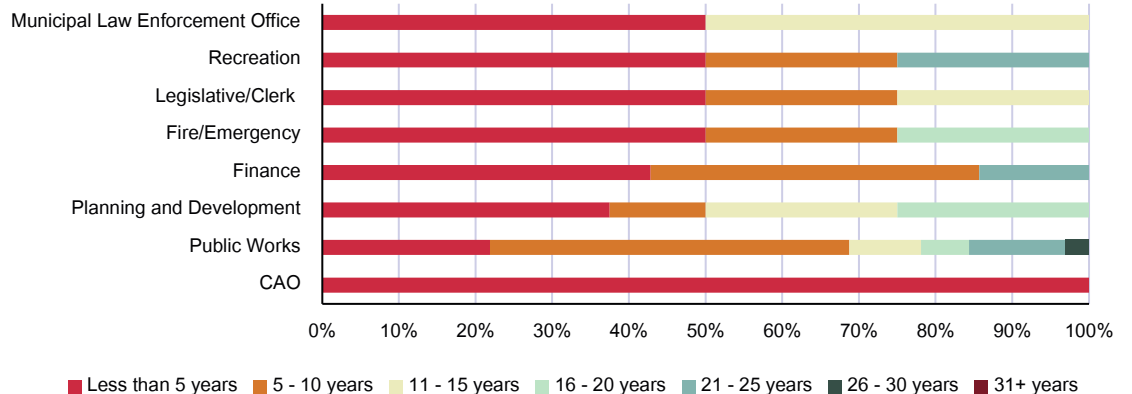
Although lack of coverage affects most positions, particularly susceptible are roles performed by single individuals. Analysis of the Township's organizational chart suggests that such roles include some of the finance positions, communications and recreation.

- ▶ During interviews, many staff indicated there was limited cross-training to cover for absences.

Another challenge to consistent, continuous operations is succession planning.

- ▶ While covering positions during short absences, such as vacation or sickness, is possible with existing staff, longer absences, such as staff departures or retirements, can best be mitigated with an effective succession plan.
- ▶ Staff turnover has been 36% in the last five years, or around 7% a year.

Department/Tenure



2.2 Plan for continuity of operations

Absences and departures can have a large impact on the continuity of the operations of the Municipality

Departures and absences can be both planned and unplanned. Two tools that can assist to continue to get the work done in any of these situations are cross-training and succession planning.

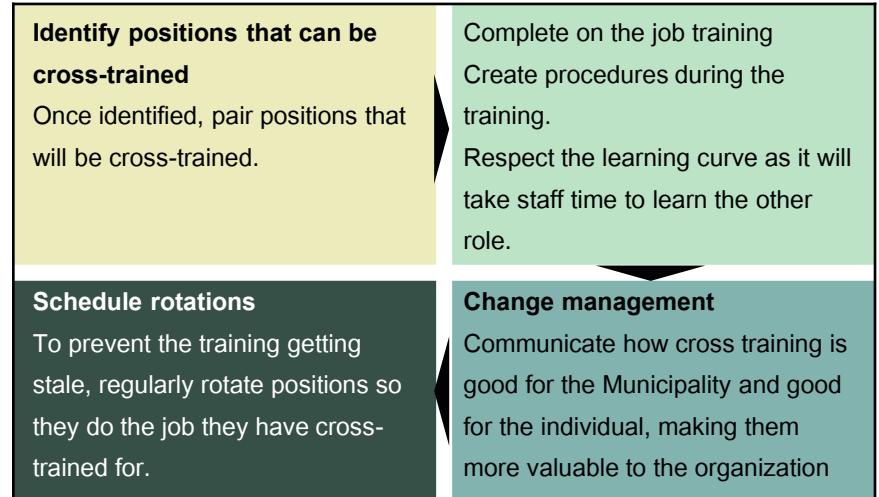
- ▶ Having staff that can “fill-in” for absences or departures means the work will keep moving – it won’t replace a person, but offers continuity of critical operations. While having a candidate to move into a position means the gap can be shortened.
- ▶ The charts to the right provide a guide to the step required for both these processes.

The succession plan should cover all key positions, not just planned departures, such as retirements

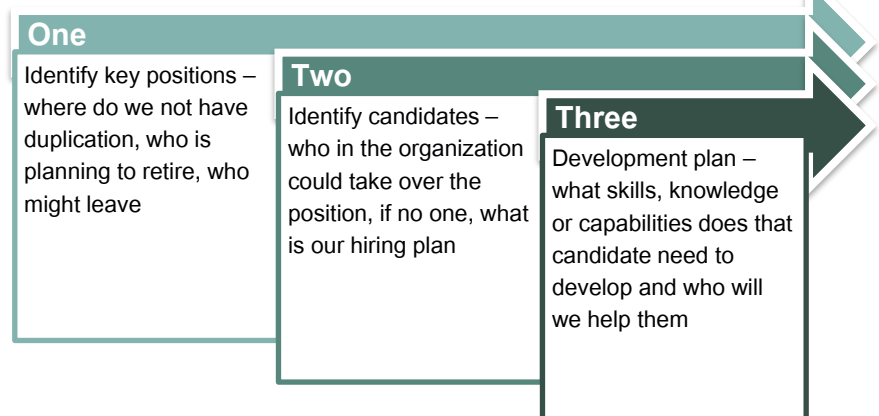
Cross-training increases the options available for the succession plan.

- ▶ Management should re-evaluate the succession plan yearly

Cross-training



Succession



2.3 Rebuild professional networks

Recommendation

Accelerate the process of rebuilding internal networks

While networks will reform naturally, the Township can help this process along with a range of actions:

- ▶ Promote horizontal communication over vertical
- ▶ Think consciously about staffing projects with collaboration in mind
- ▶ Complete formal cross-training
- ▶ Increase the corporate communication and reduce departmental deployed communications

Findings

With a large number of recent hires, old networks may no longer exist

Within organizations, staff form professional networks to help them get work done

- ▶ When networks don't exist, staff will often cite the problem of silos, which was certainly commented upon in our consultations. Many pointed to the portable units as a real problem, feeling that the units created a physical divide that reinforced organizational silos.
- ▶ They also commented that the number of new hires meant more tenured staff did not know the staff the way they used to. This issue has been exacerbated by remote working due to COVID.

These symptoms suggest that old professional networks have not been replaced as staff changed

Older networks were stable for a longer period of time but have now changed and not been reformed, giving staff the impression of silos.

- ▶ The chart to the right confirms that a large number of staff have started at the Township in recent years.
- ▶ The mobile units are a visible symptom that have allowed staff to express the impact of hiring in recent years, but collocating staff in a single office would not solve the underlying network problem.

2.3 Rebuild professional networks

Professional networks will form slowly, but the Municipality can take steps to speed up the process

A professional network is the people that a staff member knows personally across the organization and whom they may call on to help them with particular tasks. This is particularly helpful when work spans multiple departments.

- ▶ The table to the right lists a set of activities that can be used to promote the formation of professional networks.

Action	Effect
Promote horizontal communication	When staff have questions or need information, they will often go to their superior to resolve or navigate, when actually a peer in another part of the organization is better placed to address the matter. Encouraging staff to seek out the individuals and communicate horizontally will speed the building of networks and ultimately be more efficient.
Collaborative projects	Some projects might involve more than one organizational unit but have the work split and completed independently. Create collaborative teams to work together on the project gives opportunities to build networks. Short-term rental licensing might be one such example.
Formal cross-training	While talked about as a way to increase flexibility, creating networks can be designed into the structure of the cross-training. While it is desirable to cross-train people whose roles intersect – certain positions that do not intersect may be suitable for cross-training and thereby build networks.
Corporate communications	Many communications that are applicable to a large number of staff will be relayed through the various Directors. For some of these communications, it may be beneficial to gather the staff together to hear the information. While not directly network building it is reducing the vertical communication.



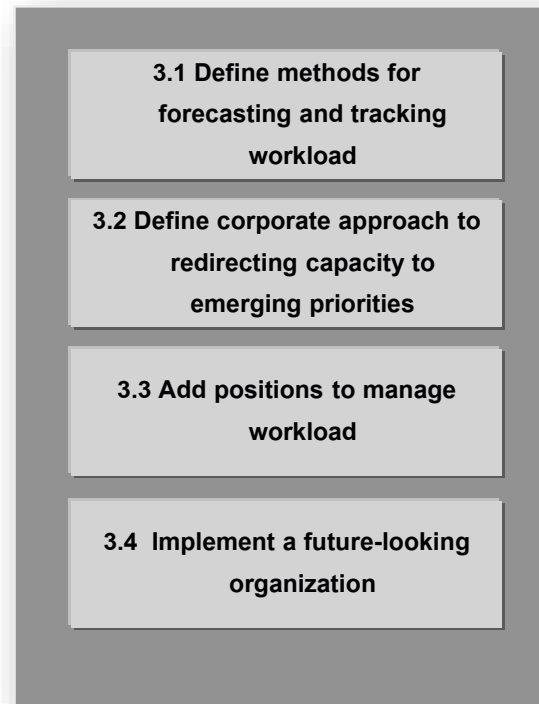
**/ PLANNING WORK AND INCREASING
CAPACITY**

3. Planning Work and Increasing Capacity

Findings

Few areas of the organization had data that related to workload and service levels. We could identify that some of the underlying drivers of work – such as population and infrastructure assets – had increased.

- ▶ With this information, we concluded that staff were at least near capacity. The recommendations here address better planning for workload, addressing some immediate capacity needs and thinking about a vision of the organization in the future.



Relevance, impact

We believe that implementing these four recommendations will position Tiny to manage anticipated growth in workload in the coming years and, importantly, to better understand its staffing needs as that workload increases.

3.1 Define methods for forecasting and tracking workload

Recommendation

Collecting data on workload and capacity will help to plan for headcount

Standardizing data collection across all departments through policies and KPIs will improve methods for forecasting and tracking workload. It can help with the following:

- ▶ Developing service standards.
- ▶ Forecast Townships needs (i.e., workload and overtime).

Findings

Workload data is not tracked universally, so we have looked at proxy measures to understand whether staff have the capacity to complete the increased workload

- ▶ Two indicators we can use are overtime and service levels. If overtime is increasing and/or service levels are declining, it would indicate that staff do not have the capacity. The table below provides a summary of the data made available to us.

The evidence of increased workload has been offset by increases in staff complement, 12.5% since 2016.

- ▶ Management reported that salaried staff do not record their overtime hours. Some estimated those overtime hours to be in excess of 400 in a year.

Area	Service Standard	Met	Overtime Hours
Planning	Application review completed	Meeting	2.4%
Building		Delayed	2.4%
Public Works	Road condition	Declining*	6.2%
Recreation	None set		6.0%
Clerk	None set		5.3%
Finance	None set		3.5%
Emergency	None set		3.7%
Bylaw	Incidents	Rising	4.4%

* As reported in the FIR, although the asset management plan is expected to reverse this

3.1 Define methods for forecasting and tracking workload




A Municipality can adopt a range of potential Key Performance Indicators (KPIs)

KPIs should have a clear purpose which traditionally falls into three distinct categories:

- ▶ **Efficiencies.** Evidence that the Township is operating optimally.
- ▶ **Effectiveness.** Residents experience effective services from the Township.
- ▶ **Transparency.** To demonstrate the Township's ability to share information.

The table to the right provides KPIs for the Township to consider adopting. A single KPI, by itself, will not provide the full picture or context of an organization's activities or situation.

For the purpose of this report, financial KPI recommendations have been excluded from the graph. This is due to the frequency of how often this information is already being recorded by the Township within FIRs and financial reporting to Council.

Category	KPI
 <p>Efficiency</p>	<ul style="list-style-type: none"> ▶ Customer Service: Percentage of inquiries (via phone, email, etc.) returned within two days, tracked through spreadsheets and resident satisfaction. ▶ Permits: Average time to get approval on building permits. ▶ Staff Safety: Total number of employee incidents/100 employees. ▶ Asset Management: Average age of infrastructure assets. ▶ Roads: Operating expense for paved roads/lane KM. ▶ Workload Capacity: Total number of overtime taken per department.
 <p>Effectiveness</p>	<ul style="list-style-type: none"> ▶ Asset Management: Ratio of reserves to tangible assets vs. households. ▶ Roads: Percentage of roads ploughed and maintained within 12 hours. ▶ Recreation: Total participant hours for recreation programs/1000 residents. ▶ By-Law: Total number of incidents.
 <p>Transparency</p>	<ul style="list-style-type: none"> ▶ Access to Information: Number of Freedom of Information Requests processed within a given year. ▶ Competitiveness: Number of bids per procurement. ▶ Strategic Alignment: Progress of corporate initiatives. ▶ Innovation: IT spend as a percentage of total operating expenses.

3.2 Define corporate approach to redirecting capacity to emerging priorities

Recommendation

Optimize operational capacity using work management solutions, upskilling of staff, and sharing of resources

Once effective KPIs are in place (see previous recommendation), the Township will be able to deploy resources in a more balanced manner. This will allow Tiny to improve the following operational facets:

- ▶ **Consistency of workload:** staff disparity in workload and output
- ▶ **Reduction of overtime:** unburdening excessively busy employees through better scheduling and deployment will reduce overtime hours
- ▶ **Predictability for staff:** clear work allocation and guidance will allow staff to better schedule tasks and track performance

Ultimately, better ways of prioritizing, scheduling, tracking, and evaluating workloads will enhance the Township's ability to deliver timely, quality services.

Findings

Multiple interviewees highlighted mismatches between work volumes, existing capacity and allocation of work orders.

- ▶ Factors that cause excessive workloads for some included: changing priorities and areas of focus, inability to adequately schedule and predict work pressures, ineffective working relationships between departments and an inability to track "busy-ness" of staff.
- ▶ Workload mismatches also appear to affect employee morale on the front lines, leading to lower employee satisfaction and productivity. Moreover, newer employees claim to be shouldering a disproportionate amount of work, while older employees claim that their cohort has a better work ethic and attitude.

Traditional methods of alleviating workload pressures have tended to include compartmentalizing administrative work to assistants, hiring more staff (permanent and temporary), and employing managerial resources to supplement capacity (through overtime).

- ▶ These methods are giving way to a new generation of tools and approaches that either lower baseline demand for services or augment capacity with technology and better decisions making. This includes work management systems, customer relationship systems, cross-functional staff deployment, and pooling of resources. The Township would benefit from targeted investments in these new capabilities.

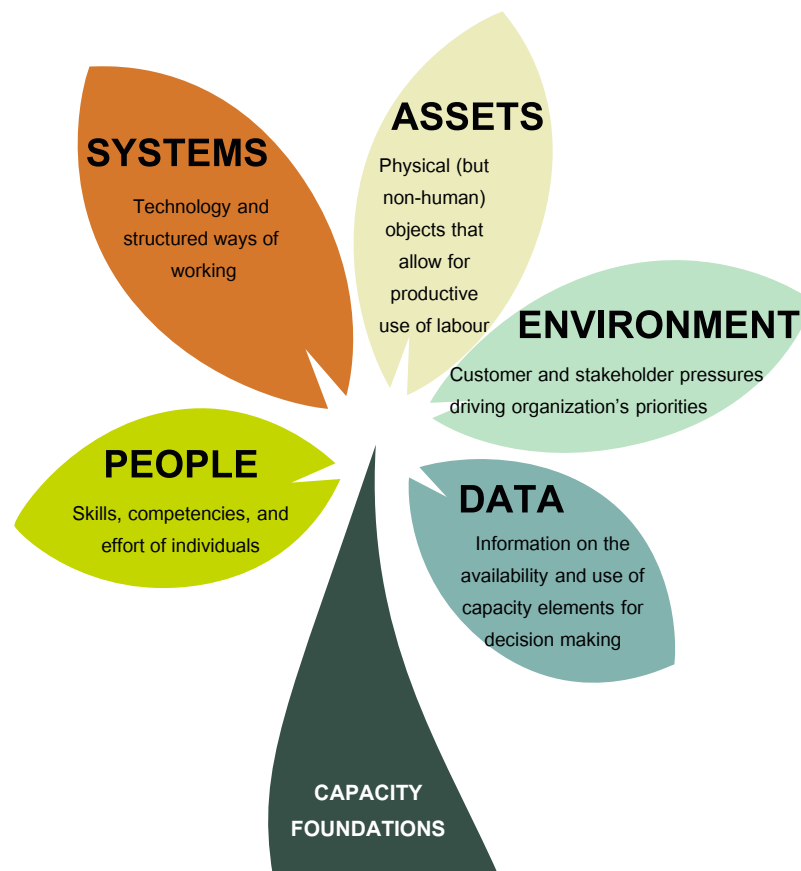
3.2 Define corporate approach to redirecting capacity to emerging priorities

Municipal capacity is the ability of a municipality to ensure services are provided on a sustained basis in pursuit of local and regional objectives.¹

For Tiny, municipal capacity entails its ability to govern and implement policy, as well as operational effectiveness, comprised of its capital, technological and human assets (see figure on the right).

We recommend that the Township seek to optimize its operational capacity using a combination of the following interventions:

- ▶ Improve measurement of the current workload by utilizing work management tools, consistent time/output tracking, monitoring of key performance indicators and analyzing the results to identify excesses or deficits in capacity.
- ▶ Use operational data and the strategic plan to prioritize areas where capacity needs to be redeployed to achieve maximum impact for the Township. Put tools in the hands of your managers to use this data.
- ▶ Draw on available capacity of the neighbouring townships and Simcoe County to supplement service delivery during periods of peak demand.
- ▶ Further supplement capacity through external service providers, expanding beyond current sewage and animal control contracts.
- ▶ Continue to hire seasonal staff during busy summer months to augment the permanent capacity of the Township.



3.3 Add positions to manage workload

Recommendation

The Township should consider splitting some of the roles

The positions of the GIS/IT Technician and the Communications/Committee Coordinator appear to be at capacity and should be split into:

- ▶ IT Technician
- ▶ GIS Coordinator
- ▶ Communications Coordinator
- ▶ Committee Coordinator

Investigate at what level of legal support would it become more cost effective to have internal legal counsel.

Findings

Legal Sourcing

The Township is increasingly being involved in disputes that require legal support for Council and staff. Relying on outsourced lawyers for advice and expertise has been a cost-effective solution up to now; however, the rising volume of legal issues may tilt the cost/access scale in favour of hiring a lawyer on staff.

- ▶ Interviewed participants commented on the need for legal assistance with increasingly complex issues. Staff suggest there is a need for legal support for most departments. This is specifically true for departments which deal with land acquisitions, sales and encroachments. These issues are increasing and adding to staff work volume.
- ▶ Staff also point to an increase in Freedom of Information (FOI) requests by the public, which would benefit from greater legal advice and expertise.

There are positions in the Township that deliver multiple services

- ▶ Currently, the responsibilities of IT and the Geographic Information System (GIS) are shared under one FTE:
 - The job description suggests this role should be focused 70% on IT responsibilities and 30% on GIS (maintenance, database development, etc.). However, interviews suggest there is a more overwhelming IT workload, reducing GIS capabilities significantly.
- ▶ The current Committee Coordinator is also responsible for organizational-wide communications. Interviews suggest demand and workload capabilities are no longer aligned and some of the communication efforts have been taken in-house by various departments.
 - The Township has five major channels of communication: Twitter, Facebook, LinkedIn, Tiny Connect and print.
 - The Township has fifteen committees that are coordinated by the same FTE.*
 - Although committees should only take up 30% of this role's time based on its job description, interviews suggest the workload is more demanding. For example, Recreation has needed to take on some of its own communications based on the role's current capacity.

* From: [Committees | Township of Tiny](#)

3.3 Add positions to manage workload – Communications and IT

The Township has had the Perry Group do an analysis of IT and present a proposed organization structure

We understand that the Township has or will be outsourcing IT support and anticipates having more Cloud-based system. As such, having a more senior IT position who can manage these third-parties would be required.

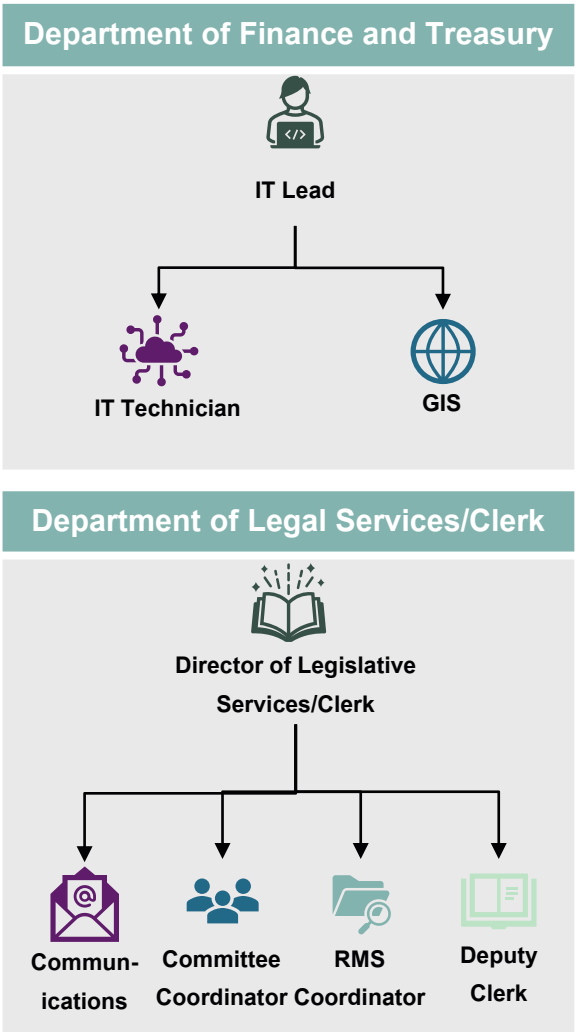
- ▶ Once the IT Lead is in place, they should work with the Perry report and inspect the workload to confirm whether splitting this role is required. Although we have also recommended in this report that the Township increases its digital footprint, which along with the current workload may justify splitting the technician and GIS roles.

The increasing communications expectations of residents and stakeholders will be better served with a dedicated communications role

The role of a communications specialist is more important now than ever with the growth of social media. As the Township modernizes, it may require a clear strategy on what these communications should look like. Therefore, a communications role should include the following:

- ▶ Development of communications strategies (within the organization, to Council and to the public).
- ▶ Working with departments on their media campaigns, announcements and public notices.
- ▶ Working with departments for internal campaigns, communications with Council, announcements and notices.

The residual committees workload will not occupy a full-time position. The Township could consider this as a part-time position or combine it with other workload to create a full-time position.



3.3 Add positions to manage workload - Legal

The Township should conduct a cost-benefit analysis of hiring legal support for in-house provision of advice

The analysis should look at the legal expenses currently incurred by the Municipality and determine if there would be a future situation where it was more cost effective to have internal legal counsel.

- ▶ We have seen at other municipalities that have internal legal services, that they still hire external counsel who are specialized in particular matters. We suspect this would be the case if the Township had internal counsel.
- ▶ Much of the commentary we received on this issue related to the amount of staff time that is taken up with dealing with external counsel. When this time is quantified in the cost-benefit analysis, you may conclude that you will be better off with a position that coordinates legal activities. This is an example of where workload could potentially be added to the Committee Coordinator role to build to a full-time position.

The table to the right provides a template for comparing the scenario's

Adjusting the work volume will allow the Township to understand at what point, each scenario becomes the most cost effective.

Scenario	Unit Cost	Work Volume	Total
External Counsel			
External Counsel	\$		\$
Staff time	\$		\$
Legal Coordinator			
External Counsel	\$		\$
Staff time	\$		\$
Internal Counsel			
Internal Counsel (60%)	\$		\$
External Counsel (40%)	\$		\$

3.4 Implement a future-looking organization

Recommendation

Restructure the upper part of the Township to increase organizational efficiency

Over time, the Township will naturally have the opportunity to change its structure as staff move from positions. Having a target structure will allow them to take advantage of those moments.

- ▶ Grouping certain activities that today are separate allows the CAO to align the organizational structure with their strategic priorities.
- ▶ For example, bringing together all of the customer service activities into a customer service department.

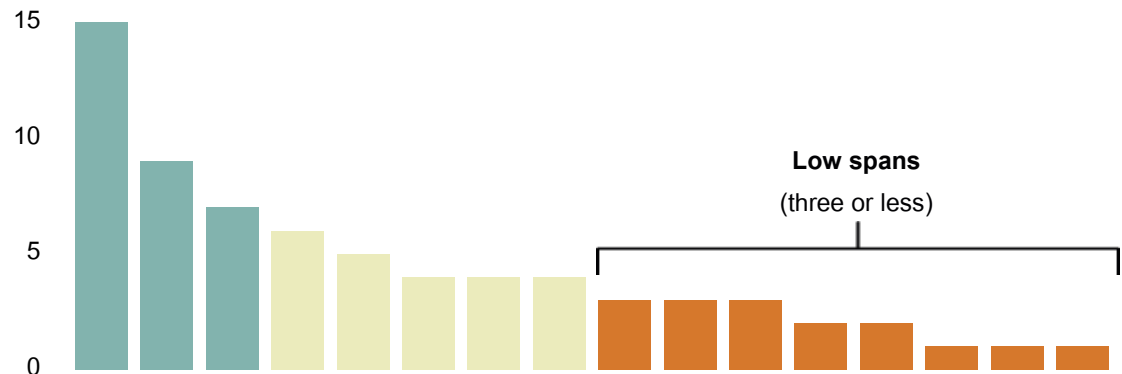
Findings

Span of control is the number of direct reports a supervisory position has

The ideal span will depend on the complexity of the work being overseen. Less complex work allows for larger spans. For municipalities, the work tends to get more complex the more senior the position, hence spans should narrow as you ascend the hierarchy.

- ▶ 25% of the Municipality's staff hold a supervisory role. Generally, we expect to see spans in the range of six to twelve. However, achieving this can be difficult for smaller organizations. The chart to the right shows that with the exception of a couple of positions, the spans are low.
- ▶ The CAO has more direct reports than we would expect. This role not only has management responsibilities but also accountability to Council. The number of direct reports has risen since the previous organization chart we reviewed, with the addition of the HR Specialist.

Spans



3.4 Implement a future-looking organization

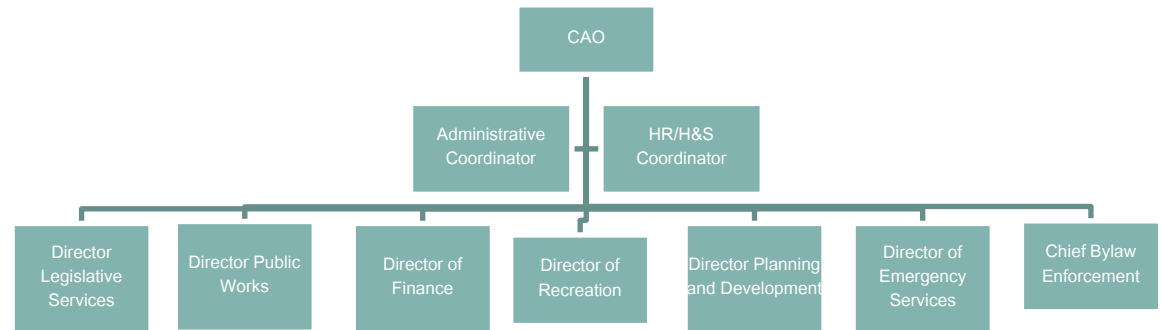
We have developed a progressive structure that the Municipality can move to over time

The structure places greater focus on customers and community development.

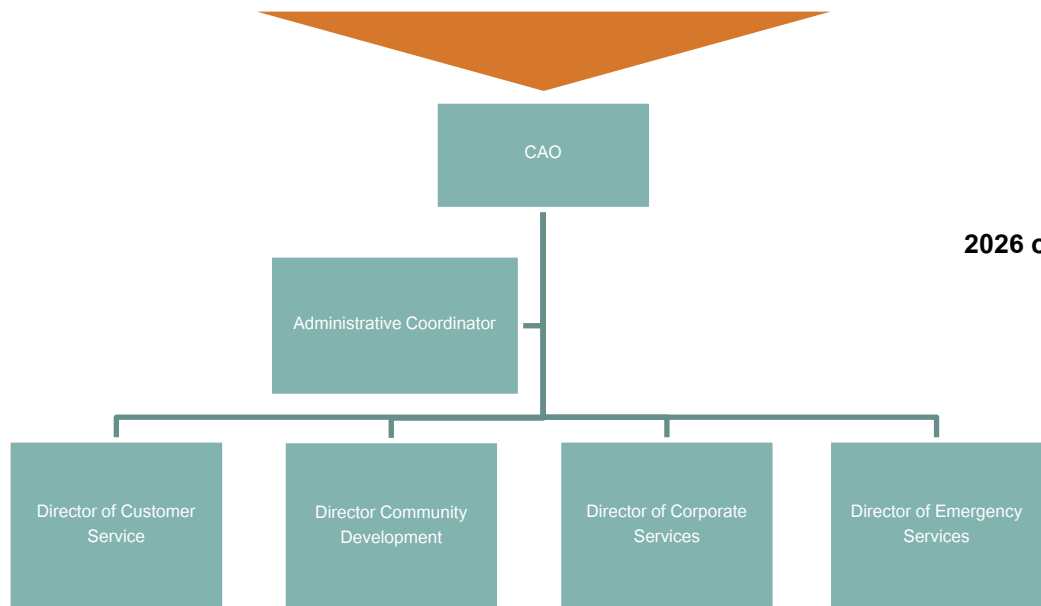
- ▶ Reduce the direct reports to the CAO and increase the reports to staff in the next layer.
- ▶ Pool administrative support to increase flexibility – increase focus on customer service.
- ▶ Combine Recreation, Clerks, Receptionist, Communications and Bylaw into a rebranded Customer Service department.
- ▶ Combine Public Works and Planning to create a rebranded Community Development department
- ▶ Combine Finance, HR, IT and the Administrative pool to create a rebranded Corporate Service department

We have put departmental organizational charts in the appendix of this report.

2022



2026 or Beyond



APPENDICES

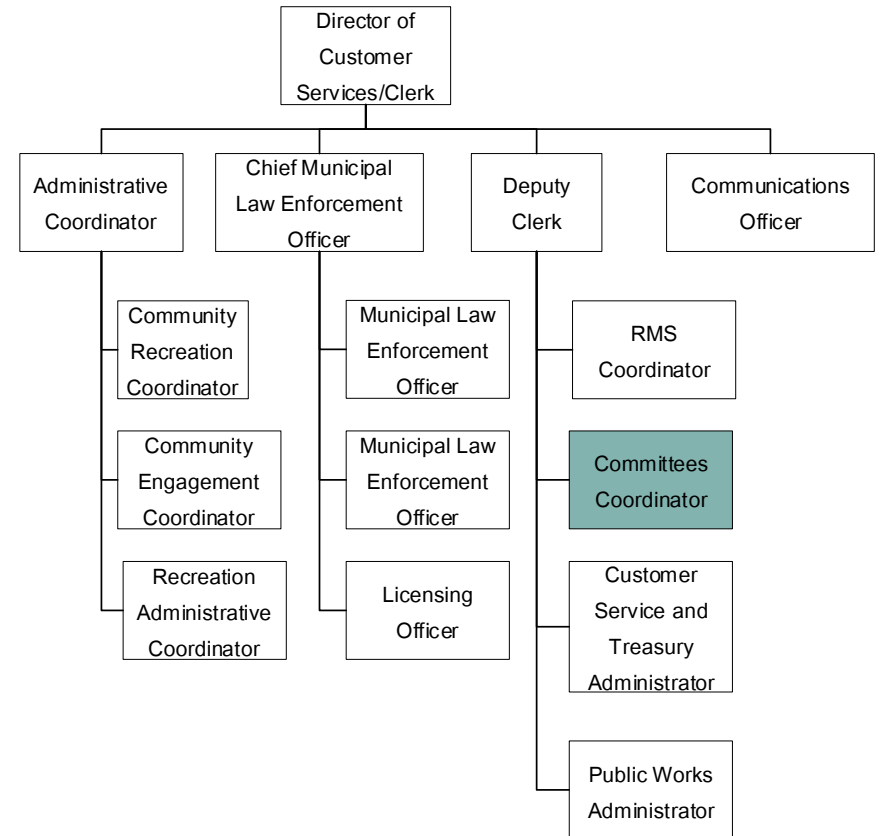
Appendix A

Future Organization – Customer Service

The Customer Service department encapsulates those services that directly address residents

Changes from the current structure include:

- ▶ Moving the recreation team and removing the director position. We have indicated that one of the existing positions could be elevated to a supervisory position.
- ▶ Moved Bylaw into the department, leaving the structure unchanged.
- ▶ The Communications position is split creating a dedicated Communications role and a separate, new position for committees coordination
- ▶ Deputy Clerk takes on managerial responsibilities for the other Clerk staff and the receptionist positions from Public Works and Finance now are coordinated in this division. This could reflect a move to a more centralized customer service function.
- ▶ The committees work of the Committees Coordinator may not equate to a full-time position, so this position could be staffed part-time or take on additional duties such as receptionist.



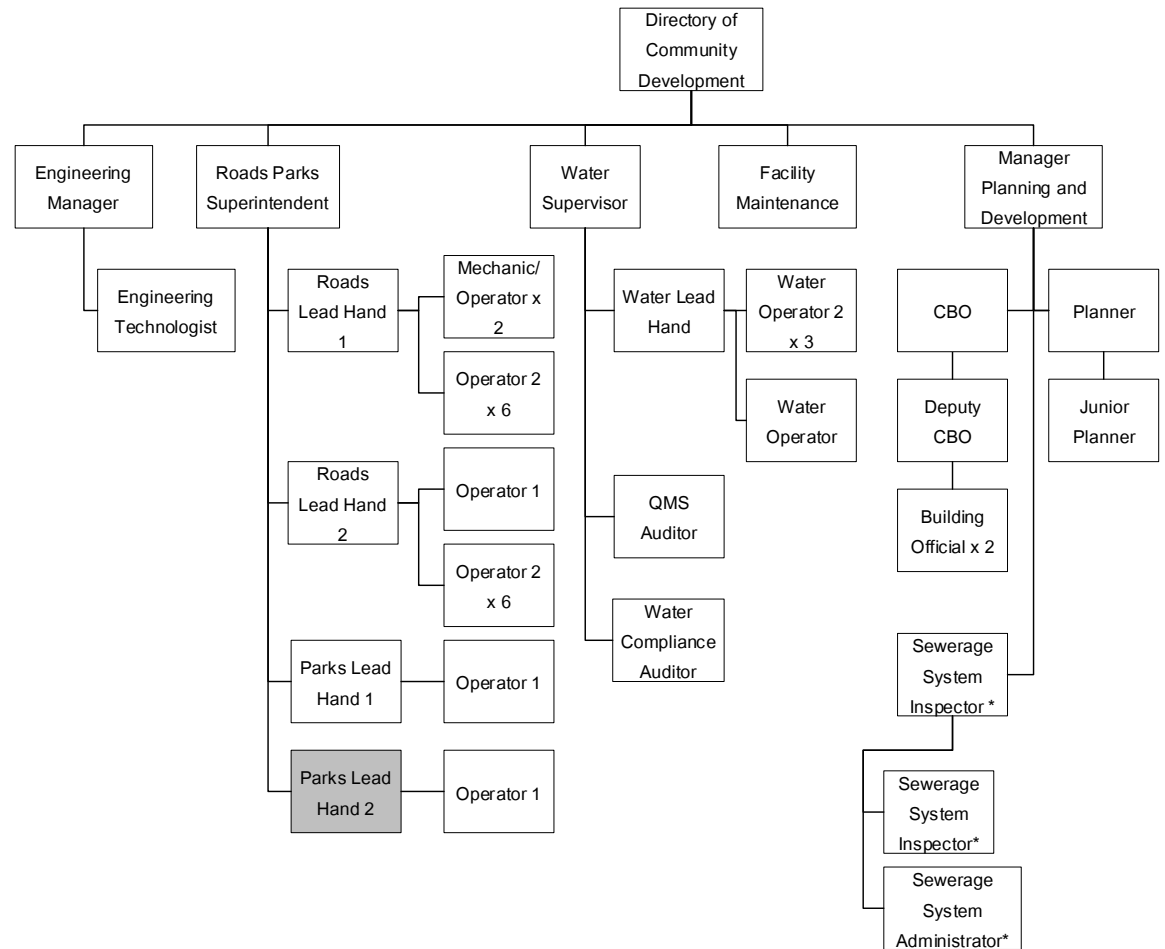
Appendix A

Future Organization – Community Development

Similar to Customer Service, Community Development encapsulates the services that relate to how the municipality evolves

The department retains essentially the structure of Public Works today and adds the Building and Planning functions.

- ▶ A Manager of Planning and Development takes supervisory responsibilities Buildings and Planning, along with the sewerage contract.
- ▶ Another option might be to relocate the Sewerage Inspectors into Water or possibly Engineering.
- ▶ Even though the ratios of Parks Lead Hands to Operators is low, we understand that seasonal employees are added to the structure, so it remains unchanged.



* Outside contracted service providers

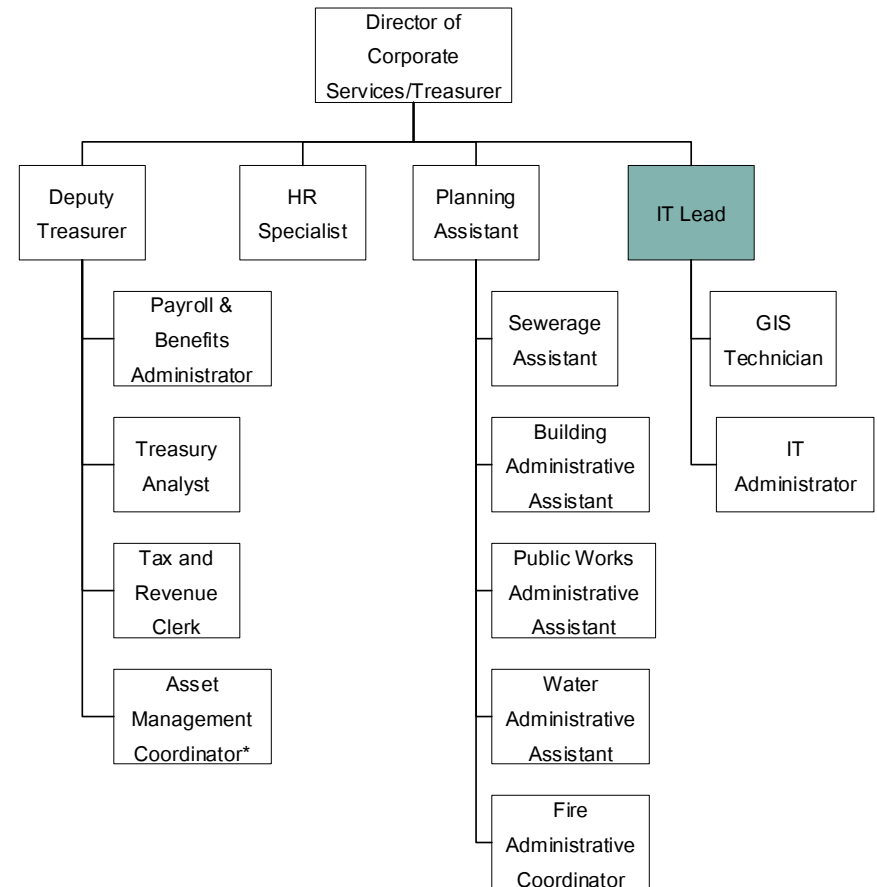
Appendix A

Future Organization – Corporate Services

Gathering the functions that support the other departments creates the Corporate Services function

The changes from the current structure include:

- ▶ The HR Specialist is now within the department rather than reporting to the CAO.
- ▶ We have added an IT Lead position – a more senior IT position that can both lead the internal staff, but also manage relationships with third party service providers.
- ▶ The most substantial change is the creation of an administrative pool. While we have left the titles to indicate the positions that are moving, we anticipate that the positions would become more general administration and through cross-training able to support all the departments.
- ▶ We have indicated a supervisory position, that in this configuration would be identifying one of the existing positions to be elevated. Another option might be to have the Executive Assistant position take on the supervisory role.



* If position made permanent

Appendix A

Future Organization – Emergency Services

The final function remains unchanged from today

The function reflects what we commonly see in other municipalities and the design of an emergency function are not driven by organizational efficiency in the way we have approached the other functions.

