

Municipality of West Grey

Budget Request

Request: CAO-04-22 – Service Delivery & Operations Review implementation – Year 1

Department: Chief Administrative Officer

Year: 2022

Included in draft budget

Proposed addition to budget

Description
Budget Request Form
Nature of request:
<p>The corporation completed a comprehensive Service Delivery and Operations Review (SDOR) after receiving a grant from the provincial Modernization Grant program. There were a number of key activities identified over a three-year period to address corporate inefficiencies, operational struggles and ongoing challenges. This Budget Request Form (BRF) presents the recommended action items for implementation in 2022.</p>
Justification:
<p>Service delivery and operations review, 2022 recommended activities</p> <p>Item 1 (A): Technology recommendations: \$40,000</p> <p>At a cost of \$40,000, the SDOR consultant team recommends the corporation retain a consultant firm to investigate a Customer Resource Management (CRM) system that will assist with customer service, create process efficiencies and provide corporate-wide consistency in service delivery and information sharing and access.</p> <p>Staff has completed some preliminary research as part of the records management needs and the customer service strategy development, and proposes an adjusted solution to the SDOR recommendation.</p> <p>Council has allocated \$25,000 from the Municipal Modernization Grant funds to obtain additional software required for records management implementation. Council could consider supplementing this with an additional \$25,000 to enable staff to proceed with implementing a CRM system that produces work orders, creates customer profile accounts, and provides records management, data management, monthly service delivery statistics, etc. The \$25,000 modernization grant would be eligible to use for the start-up, one-time costs; the additional \$25,000 would be required for annual licenses, system updates, etc. and would need to be part of the base budget going forward.</p> <p>In this proposal, rather than \$40,000 for a consultant, an allocation of \$25,000 would move the corporation to operating efficiently with a robust CRM/records management data base system rather than simply retaining a consultant to review and recommend a platform solution.</p>

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Item 3: Resource management recommendations: \$60,000 plus 4 FTE (3A, 3B, 3C)

Staffing levels – item 3A

In 2020, West Grey completed a compensation and organizational review. That review identified several staffing gaps based on staffing levels and structures of comparable municipalities, current workloads, and council priorities. The consultant recommended four new positions in 2021 and four new positions in 2022.

In 2021, West Grey completed a service delivery and operations review (SDOR). That review identified four areas of focus – technology, organizational effectiveness, resource management and performance management. Additionally, the SDOR endorsed all of the recommendations in the 2020 review, namely, the staffing gaps, the need to develop a succession planning program, and the need to allocate funds for regular wage and compensation reviews.

At the November 30, 2021 budget meeting, staff presented the following positions:

- Administrative Assistant, Finance and Asset Management
- Environment and Capital Projects Coordinator
- Customer Service and Records Clerk
- Building Inspector/Plans Examiner
- Filling vacant Manager, Community Services position

The building inspector/plans reviewer position was created using building revenue (not tax-funded) and the finance and asset management position was created by allocating the salary of the vacant community services manager position. The other two positions – customer service/records clerk and the environment/capital projects coordinator - were approved. The Community Services Manager position remains vacant.

At the January 4, 2022 budget meeting, staff presented the following positions:

- Human Resources/Health and Safety Coordinator
- Deputy Fire Chief/Fire Prevention Officer
- Bylaw and Property Standards Officer
- IT Technician

Council approved a deputy fire chief/fire prevention officer.

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The SDOR recommended four new positions for 2022, two new positions in 2023 and two new positions in 2024. At this point, council has approved the following four tax-levy funded positions, which align with the consultant recommendations:

- Administrative Assistant, Finance and Asset Management
- Environment and Capital Projects Coordinator
- Customer Service and Records Clerk
- Deputy Fire Chief/Fire Prevention Officer

Compensation assessment (3B)

The SDOR recommended \$20,000 be allocated in 2022 to meet the recommendation to incorporate a regular wage review cycle, and complete a compensation assessment, ensuring equity and adjustments are completed.

Succession planning and training materials (3C)

The SDOR recommended \$40,000 be allocated in 2022 to develop a succession plan and corporate-wide training materials. This aligns with the findings of the 2020 review and addresses HR gaps in the organization.

When considering 3B and 3C total \$60,000, and would produce valuable results for the corporation, the challenge remains there is no dedicated staff position to lead, implement and ensure this work is ongoing. Factor in the recommendation that the corporation hire an HR staff professional who could undertake, create and manage both a succession planning program and a training program (in addition to several other HR functions), it may be more prudent for the corporation to allocate these funds to an HR position, thereby ensuring continuity, reducing the need for HR consultant services, and mitigating potential liabilities and litigations etc.

An HR position will be highly recommended in 2023, however, this could be achieved by combining 3B and 3C as an FTE for the 2022 budget.

Consequences of not funding:

The recommendations from the SDOR and the previous Organizational Review resulted from comparing similar municipalities, assessing council goals and priorities and, most importantly, ensuring the corporation is meeting legislated requirements. West Grey has experienced growth and will continue to see increased development for the foreseeable future. Remaining status quo will not enable the corporation to meet the increased demands for service, the commitment to community development and improvement, the increased responsibilities of the corporation and the growing workload.

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Alignment with council priority of strategic plan						
Pillar: Work together						
Goal: Listen and empower						
Strategy: Instill a customer-first workplace culture						
	2022 Mandatory	2022 One- time	2022 Growth	2022 Service level	2023 One- time	2023 Service level
Capital Expenditure						
Operating Expenditure						
Funding Source						
Tax Levy			\$85,000			
Reserve						
Grant		\$25,000				
Fees						
Other						