

Recommendation	Opportunity Detailed Description	Quadrant	Year Start	Comments/ Assumptions from Consultant/Cost	Current Status	Next Steps	Staff Assigned
1.1.1 Undertake an update to the Township Strategic Plan	Develop a Township Strategic Plan. Prepare prior to next term of Council by undertaking Community Engagement New CAO to lead process. In conjunction with the next Strategic Planning exercise, develop key performance indicators with accountabilities, business plans and accountabilities. Ensure Plans are supported with SMART objectives and accountabilities.	HIGH EFFORT,HIGH IMPACT	2021	CAO and Corporate Project Officer to undertake. Estimated 30 days work.	The Strategic Plan is on the Agenda for the Committee of the Whole on February 2023	Ongoing	Elana
1.2.1 Develop a Policy Review Process.	Develop a practice of governance oversight through the routine review of "key" policies (at a minimum once per council term) in order to instill Council's oversight role. Remove procedures from corporate policies.Develop a Policy Review Process. Transition existing policies to set guiding principles, accountabilities and direction as opposed to procedures.	HIGH EFFORT,HIGH IMPACT	2021	Assign to each manager. Policy framework to be developed by CAO and Clerk. Approximately 40 days work over 3 years.	An Intern from the Trent Poli-Sci program is working with the Township for Winter-Spring 2023 with a focus on reviewing the Policy Manual.	New policies will be brought to Council as available.	Elana, Martina and SHRP
1.3.1 Undertake a review of the Procedural By-law including all advisory committees.	Undertake a review of the Procedural By-law to prioritize and allocate time for critical discussion in areas of policy development - potentially consider a "Committee of the Whole" option within the framework of the Council meeting. As part of this review, all advisory committees, boards and agencies should be reviewed with a view to ensure they are aligned with the (future) Strategic Plan. Establish clear mandates with full terms of reference and ensuring appropriate resources are allocated to support the work. See Appendix for recommended changes.	LOW EFFORT,HIGH IMPACT	2020	Clerk to develop (21 hours) and present to Council.	Report went to Council and new By-law was approved	Completed	Martina
1.4.1 Develop a comprehensive Council Training Program.	Municipal issues are demanding a greater amount of Council attention and understanding of evolving issues. Council should allocate both time and financial resources to ensure ongoing Council training. This could be a joint project with other municipalities.	LOW EFFORT,HIGH IMPACT	2022	Annual cost of \$10,000	A robust new Council Training program was provided. Additional training on various topics will be arranged over the term of Council. There is a program in place to support conference and training requests from Council.	Ongoing	Martina and Elana
1.5.1 Develop an annual agenda management plan.	Clerk should support the CAO through E-Scribe's workflow tracking with enhanced agenda management process- This shift will require a team effort by the senior management team. Look to joint project with County to post all agendas on one platform.	LOW EFFORT,HIGH IMPACT	2020	Clerk to develop (35 hours) requires consultation with management and present to Council.	All Council meetings for 2022 have been added to eScribe to assist in meeting planning and report management. Post-Meeting Action log has been implemented in eScribe to track work that flows out of Council and Committee meetings.	Completed	Martina
1.6.1 Provide Access to Resolution Database in Escribe.	Provide Access to Resolution Database in Escribe. Move to "business case" approach to Council meetings and provide expanded information through dashboards.Escribe software has additional modules that may assist the Township with expanding community engagement and delegation management. Following the implementation of a new budget process and customer service requests, provide real time dashboard data to Council.	HIGH EFFORT,HIGH IMPACT	2021	Included in IT training and strategy.	On the new website, agendas and minutes are searchable back to January 2017. At this time the other parts of the recommendation have not been investigated.	Completed	Martina
1.7.1 Develop a Shared Service Task Force	As part of a long term strategy, undertake a joint service review with the County and neighbouring municipalities for shared services. Look at Recreation, Waste Management, Winter Control, Corporate Services and Fire.	HIGH EFFORT,HIGH IMPACT	2021	Managers and Council- Estimated 420 hours. Savings will offset costs in 3 years.	A meeting was held by the County to re-launch the Streamlining and Efficiency Committee, first items for review are planning processes and joint purchasing/procurement.	Ongoing - Meeting are being held on a per topic basis and new opportunities to share services and resources. Shared IT with AN, group discussions regarding AMP project.	Elana
1.7.2 Undertake a joint Recreation Master Plan with neighbouring municipalities	Undertake a joint Recreation Master Plan with HBM, Asphodel Norwood and North Kawartha to share services, and improve utilization of all facilities, determine right mix of programs for delivery. Joint implementation of BookKing where all facilities can be booked online. Many municipalities have undertaken similar joint projects and are seeing mutual benefits.	HIGH EFFORT,HIGH IMPACT	2020	External Consultant and Recreation Manager time - 30 hours. Long term Savings and increased utilization will cover costs.	Discussions with AN and NK regarding ice times. Both already have Master Plans in place.	Further discussions with municipalities is they are amenable.	Mike
1.7.3 Explore upload of Waste Management to County.	Peterborough County provides waste reduction services to all residents. Each Township provides garbage collection and manages transfer stations. Each Township provides varying levels of waste management services to its residents and is responsible for its own transfer stations and/or landfill sites and any bag tag/limits/user pay system or policy enforcement. Economies of scale, reduced overhead and administration can be realized through one provider as well as improved customer service.	HIGH EFFORT,HIGH IMPACT	2020	PW Manager time -30 hours. Long term Savings and increased utilization will cover costs	Ongoing joint meetings occurring	Presentation to Council re Recycling on Feb 7 2023	Jake and Tara

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1.7.4 Undertake a joint Winter Control plan.	Undertake a joint Winter Control plan and update intermunicipal agreements to eliminate duplication and overlap between the County, neighbouring municipalities and DD services.	HIGH EFFORT,HIGH IMPACT	2020	PW Manager time -120 hours. Long term Savings and increased utilization will cover costs	Investigations into concept but serious concerns regarding liability.		Jake and Elana
1.7.5 Explore Shared Corporate Services and County wide 311.	Work with County, neighbouring municipalities to find joint services to access professional support, eliminate duplication of effort in IT, HR, Clerk services and Finance. In particular, explore shared services for long term financial planning/budget software and development, payroll, financial processing, HR advice, IT strategy, software and application support, marriage licenses/ceremonies, agenda/records management software, asset management professional services. This will increase overall services and decrease costs for DD residents.	HIGH EFFORT,HIGH IMPACT	2020	External Consultant and Various Manager time - 120 hours. Long term Savings and increased utilization will cover costs	Meeting are being held on a per topic basis and new opportunities to share services and resources.	Waiting on more information from County SDR.	Management
1.7.6 Review Fire Services County-wide	Undertake a fire services review across the County - many municipalities are doing this under modernization projects (Northumberland, UCLG).	HIGH EFFORT,HIGH IMPACT	2020	External Consultant and Fire Chief time - 40 hours. Long term Savings and increased utilization will cover costs	Current focus is on area dispatching, paging and costs for upgrades.	A possible 2023 Master Fire Plan	Chuck
1.7.7 Review possible Planning and Building/Bylaw Services	Undertake a shared service review for building/planning and bylaw services with view to develop synergies between Townships and possible sharing of software and resources.	HIGH EFFORT,HIGH IMPACT	2020	External Consultant and CBO time - 40 hours. Long term Savings and increased utilization will cover costs	An agreement is in place with HBM to share a CBO. CloudPermit system is now active.	- Investigating AMP program with the City for enforcement services. - Implementation of CloudPermit for Planning Applications	Don, Christina and Elana
2.1.1 Create HR Committee of Council	Creation of HR Standing Committee of Council to address: organizational issues, compensation and benefits, code of conduct, Health and Safety considerations, recruitment and retention issues etc. This Committee will allow for the development of the HR plan, address ongoing issues including H&S and allow for confidential items to be fully discussed. Concurrent with Procedural Bylaw Review.	LOW EFFORT,HIGH IMPACT	2020	1 meeting per month - 5 Councillors, CAO to attend	Committee has been formed and TOR in place.	Committee is actively meeting	Elana and Martina
2.2.2 Formalize HR partnerships with County and other professionals to support HR committee.	Access to HR professional services is current a "one off" scenario for specific projects such as recruitment. The County has provided services on a pay as you go basis. A formal service level agreement with the County or other professional that provides ongoing support may be warranted given the number of issues and the recommendations in this report. Advantage to County is that they utilize GP and may have HRIS.	HIGH EFFORT,HIGH IMPACT	2021	Assumes \$100 per hour, 30 working days per year.	HR Support Services are being provided by SHRP	Completed	Elana
2.2.3 Consider outsourcing payroll to County or other professional service to provide advice, training and undertake system review.	Municipal payroll and pension administration is complex and represents regulatory risk as well as potential for long term impacts to employees. The Township should consider accessing advice of professional payroll services either through a partnership at the County or a consultant.	HIGH EFFORT,HIGH IMPACT	2021	Assumes \$40 per hour, 30 working days per year - savings of 0.25 fte annually	Finance Department is adequately staffed to take on payroll responsibilities. SHRP is tracking entitlements via HRLive System	Currently undertaking system review with Tammy and will include training. - HRISMyWay is also being investigated as an option. - Change Management Strategy to be created as part of implementation	Paul
2.2.4 Consider outsourcing Planning Expertise.	Consider outsourcing Planning processes through partner with other municipality or vendor of record on a fee for service basis.Professional planners will provide efficient,effective advice to developers. Many municipalities share these services or hire consultants who also present to Planning Committees and Council. Allow Clerk on providing process advice and allow for concentration on other priorities. Assigned administrative support to track planning applications, time spent and cost to determine appropriate fees.	HIGH EFFORT,HIGH IMPACT	2020	Cost recovery model - No cost to Township - Savings in Clerk's time 50% capacity	New Planner to begin on June 27, 2022.	Additional fee review, Bill 109 changes to be accounted for.	Christina
2.2.5 Consider Corporate Project Manager.	Hire Corporate Project Manager - could be an internal reallocated position or contract (2-3 years). Outsource Technical Services for AM, IT and the Edwards Pit.A Corporate Project Manager is needed to assist the new CAO with oversight of all the corporate projects and consultants including AM, IT (MESH/GP), Edwards Pit, Facilities.	HIGH EFFORT,HIGH IMPACT	2021	Could be an internal reallocated position. Costs assumes external candidate for 3 years.	Will be brought forward as part of budget discussions.	On hold as all projects are being managed in house. Pending the project schedule for 2023, further discussions may need to be held.	Elana

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2.3.1 Implement New Organizational Structure and Performance Management.	Organizational structure recommendations include new reporting relationships and focus. Managers should be involved in the recruitment and performance management of their staff. Consider additional support in Finance for analytical capacity.	HIGH EFFORT,HIGH IMPACT	2020	Internal time for all staff and managers. Additional cost unknown.	Organizationa Structure is complete. Will continue to evauate.	Used performance management program available via SHRP, CAO performance review complate used a 365 model. Job descriptions being evaluated.	Elana and Martina
2.3.2 Refocus Clerk and Deputy Clerk roles	Refocus Clerk and Deputy Clerk roles to statutory duties, customer service and community engagement. Front Counter, Customer Service representative should report to Deputy Clerk. As outlined in this report, significant work is required in records management, agenda management/planning, website development, community outreach and engagement as well as complaint/service request management.	HIGH EFFORT,HIGH IMPACT	2020	Offset time against Planning - Increased Service potential	Job Descriptions are now complete and overall review of "full complement" is being conducted .	On hold until a fulll staff complement is in place.	Elana and Martina
2.3.3 Revamp Administrative Roles with specific responsibilities reporting to individual managers.	As per the new organizational structure, revamp administrative and finance roles to support managers and improve accountabilities.	HIGH EFFORT,HIGH IMPACT	2020		Completed	Completed	Elana
2.3.4 Revamp the Recreation and PW Management roles.	Revamp the Recreation Manager role with programming oversight with the view to increase the use of the facilities year round. Transition the Assistant to a Recreation Supervisor. Convert 2 part time staff to full time, one lead hand role. Similarly, PW Manager role and Supervisor should be revamped .As per the new organizational structure, revamp recreation and public works roles and transform two part time staff to full time. FT will allow for better training, reduced recruitment costs and more attractive positions.	HIGH EFFORT,HIGH IMPACT	2021	Convert 2 PT positions (current hours = 900 hours per year). Savings in training, recruitment and risk estimated to offset cost by 50%.	New job descriptions are in place. Recreation Department hiring is complete. PW has been reviewed and modified staff roles.	Completed	Elana and Mike
2.4.1 Modernize all job specifications and undertake a Pay Equity review to ensure compliance.	As per the new organizational structure, revamp administrative roles to support managers and improve accountabilities.	HIGH EFFORT,HIGH IMPACT	2020	Internal time or Consultant. 24 Job specs at 2 hours each. Pay equity review - external	Revamped organization structure and job descriptions are complete.	Full pay equity review to be completed in 2023.	Elana
2.5.1 Undertake a Skills Inventory and Training Needs Assessment	Survey administered based upon skills acquired, types of training required (for staff and volunteers) supplemented by assessment.	HIGH EFFORT,HIGH IMPACT	2020	Clerk/Deputy Clerk to lead project - 40 hours each	Completed as part of organizational structure and job reviews.	Staff have been given new training opportunties and encouraged to participate in professional development.	Elana and Martina
2.5.1 Document building and planning processes.	Document building and planning processes. Develop training programs for customer service staff. Building applications are not currently supported by detailed public information and staff lack detailed training.	HIGH EFFORT,HIGH IMPACT	2020	Internal of Student - 40 hours	New CloudPermit system is in place, along with new website.	Corporate Wide customer service policy in place. Building Department internal customer policy is being developed, once settled into new space public education will take place.	Don and Elana
2.5.2 Ensure adequate technical training for part time/volunteers.	Explore training & development opportunities to expand staff skills for fire prevention and inspection related activities and or build. Appropriate performance measures with incentives to meet and exceedEnsure adequate training for Parks and Recreation part-time staff, including health and safety training (e.g. basic refrigeration), and how to carry out playground inspections. Technical training for part time staff is needed.Technical training for staff and volunteers.	LOW EFFORT,HIGH IMPACT	2021	External training for part time staff - Mostly External	Management has implemented new training programs and a new onboarding process is in place.	Completed	Management
2.6.1 Develop Change Management Strategy for SDR Implementation	Developing a change management strategy provides direction and purpose for all other change management activities. By outlining the unique characteristics of the change and its risks and potential resistance, change practitioners set themselves and their project team partners up for success. Having staff involved a shared vision/strategic plan will assist in developing the change strategy and achieving buy-in. Training in change management would be beneficial given the extent of the changes required followig a long period of stability.	HIGH EFFORT,HIGH IMPACT	2020	Corporate Project Officer to undertake. Estimated 10 days work annually.	Continous improvement of services and communication with staff.	This is an ongoing project.	Elana

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3.1.1 Develop IT Strategy for integration of Township systems and expand utilization.	IT Strategy should be developed to fully integrate and enable all systems at the Township to provide Web- and Mobile-enabled services to the citizens.Review and rationalize system utilization and eliminate non integrated systems where possible (eg.Building Permits System) Long term strategy would guide all IT investments, purchases and projects. County wide approach to implementations of MESH, BookKing, PSD, and building permits online. Look at IT Service provider contract as part of this project including moving to County wide services.	HIGH EFFORT,HIGH IMPACT	2020	Staff time savings from reduced duplication of effort and reconciliations. Modernization funding?	Ongoing	Working with AN to hire IT personnel. Ongoing work with Finance Team.	Elana and Paul
3.1.2 Expand IT service and help desk	Add Help desk Services to current IT contract to allow staff to launch their own requests and "free up" staff time. Request long term plan for hardware replacement.	HIGH EFFORT,HIGH IMPACT	2020	Annual cost of \$4000 but savings of .25 FTE in administration	Ongoing	Working with AN to hire IT personnel.	Elana and Paul
3.1.3 Implement Virtual City Hall to provide real time online access for customers to apply, review and pay for services.	Virtual City Hall (VCH) is a customer self-serve application that integrates with DD's financial software. Customers online Animal Licensing, Locate the owner of a lost animal. Business Directory · Bylaw Violations – Contact Information eSend Integration – message inbox, view bills online. General Receivable Accounts - Customers can view and pay for their general receivables. Paperless Notification Sign-up. Permits -Customers can apply, view, update and pay for their permits. Pre-Authorized Payments Sign-up. Property Search – Search for property roll information. Property Tax Accounts - Customers can view and pay for their property tax accounts. Property Tax Certificates – Purchase and view tax certificates.Vendors can review purchase orders, submit invoices, update information such as EFT and view the status of their payments.	HIGH EFFORT,HIGH IMPACT	2021	Module Cost = \$27,000. 30 minutes per setup + issuance x 3000 households x 50% uptake - assumes 5 transactions per year @ \$5 per transaction	Staff are reaching out to Selwyn and Cavan Monaghan to see how they are liking VCH and costs	On hold pending further investigation. Staff received demo and spoke to other Townships who implemented; they found that the implementation was cumbersome with not a lot of takeup from residents. Therefore, staff are focusing on implementing E-Send for tax bills and pushing electronic payment options such as portal on website, ebanking ect....	Carol-Anne and Paul
3.2.1 Create a LEAN Six Sigma Process Improvement Team.	Move to LEAN Six Sigma process improvement team. Provide training and support to develop new ways of doing business on a continual basis.LEAN Six Sigma will enhance staff skills. Management should become champions of change and LEAN Six Sigma. Undertake a 5S project at the Operations building with an office and "stores" area.	LOW EFFORT,HIGH IMPACT	2020	External consultant trainer	White Belt Training has taken place for Managers	A review of training opportunities is taking place to address skill gaps and most beneficial to the organization as a whole.	Elana
3.2.2 Procure a new Customer Service Request (Complaint) system to track all complaints and allow for online submission.	New Customer Service Request (Complaint) system to track all complaints and allow for online submission. Utilize BookKing more fully by activating the Public Site and using it to book all appointments, regardless of departmentProcure an online Service Requests and Utilize "Booking" Online facility scheduling to implement for other services to improve customer experience (eg. meetings with CBO, staff, commissioning documents, planning applications). Given the COVID situation, reducing time waiting at the counter is desirable.	HIGH EFFORT,HIGH IMPACT	2021	Service Requests module - integrate with MESH and create a work order and GP for customer database through middleware.	Investigation into opportunity have taken place. New website provides opportunities for online submissions and tracking of submissions.	New Policy and Procedure is in place and approved by Council. Using interal Excel sheet to track complaints.	Elana and Martina
3.2.3 Develop detailed tax policies and procedures. Implement E-Send - Tax E-notices and AR E-notices.	Document processes and move to eSend is a GP module that is used to deliver bills and notices to customers via email. 2. When a customer browses their accounts they can open th PDF bills for each transaction that was sent by eSend. Customer can choose to enlist it to paperless notifications. E- notices will save significant time and money for the Township, eliminate costly printing, folding, postage and handling costs.	HIGH EFFORT,HIGH IMPACT	2020	Module Cost = \$6700. 30 minutes per setup + issuance x 4,500 properties x 50% uptake. Savings calculated at \$10 x (4,500 tax bills x 2 annual billings + 300 (arrears letters) x 50% uptake - \$17700 per year x 3 years	Staff have been trained on eSend Module. Currently getting forms created for public to use to request service. - Electronic tax bills will be available 2023	View of Polices to take place in 2023. AR will need to be reviewed outside of tax process including communication and collection tools.	Carol-Anne and Paul
3.2.4 Implement Self Service time entry, Epaystubs and an integrated work order management system including FirePro. Create a full set of payroll policies and procedures.	1. Implement Self Service time entry and an integrated work order management system (MESH). 2. Create a full set of payroll policies and procedures. This should be incorporated with the capital planning process as well. 3. Integrated FirePro with Dynamics 4. Implement GP E-paystubs will eliminate paper and effort.	HIGH EFFORT,HIGH IMPACT	2020	Mesh = \$9500 annually + 300 device fees + \$4400 activation fees. Additional Mobile devices and plans \$50/month for 27 staff. A Savings calculated at 3 days per pay period - Finance + 1 day per pay period for public works (\$25000 x 3)	FirePro has been integrates with GP to streamline payroll for Fire Service.	Payroll system is in early stage and will go live in Spring 2023. New system will allow for electronic pay stubs, T4 ect...	Chuck (Paul)
3.2.5 Develop Inventory Policy and system	Inventory Policy and processes be developed. The Township can look at possible integration with key vendors in order to reduce data entry.	HIGH EFFORT,HIGH IMPACT	2020	Inventory policy to be developed and implemented internally - 10 days work for Treasurer and Public Works Assistant. Savings in time and inventory losses will offset	Work is taking place across the corporation to enhance inventory controls.	Document all inventory items and outline the process for each item; refine where needed. - Finance team is working through inventory control for sand, salt, gravel ect...	Management
3.2.6 Centralize Purchasing Functions in Finance. Develop New Procurement Policy. Implement Purchase Orders and workflow as well as online bidding system .	1. Purchasing policies and processes centralized. Policies updated to meet CFTA requirements. 2. Implement GP purchase orders modules, procurement, 3 way matching and training. Include encumbrances and commitments. 3. Paperless workflow processes. 4. Implement an Electronic Vendor Bid Submission that would allow vendors to submit their bids electronically. For tenders and quotations the pricing would be input directly into the system.	HIGH EFFORT,HIGH IMPACT	2022	Module Cost = \$6000. Savings to be realized in procurement processes - Estimated time saved = 7 hours per procurement.	New website will have virtual Bids and Tenders Portal. Reviewing Procurement Policy.	New Procurement Policy is in place. Next step is roll out of Bids and Tenders. Further review and update to Procurement Policy to take place regarding reporting requirements and process. Last piece will be to centralize purchasing.	Martina and Paul

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3.2.7 Corporate AM Consultant to lead detailed process review to integrate AM practices and lifecycle costing in daily activities.	Fully implement Work orders management and scheduling in order to capture maintenance, repair and replacement for all assets. This should be incorporated with the capital planning process as well. Regulation O.Reg 588/17 requires AMP for all core assets by 2021 including current levels of service. Data collection and processes need to be in place for all assets by 2023. Levels of service require public consultation. Implement Self Service for Employees - Time and attendance and work order management, CVOR reporting (mobile)	HIGH EFFORT,HIGH IMPACT	2020	Internal costs - 1 hour per week for each manager	Being reviewed by Treasurer as part of Asset Management Program.	Asset Management Plan project is underway. Update to Council in Q1 2023	Paul
3.2.8 Review the next steps for the Building Permit Online.	Reconsider in house development. Reimplement Permitting module. Explore other online software options that are already established.Eplan systems allow for permit applications and blueprint markups. Some products have moved into planning applications (eg. PSD, Avolve, Eplan) Any product still must integrate, to some extent, with the financial system. Integration with MPAC already in place.	LOW EFFORT,HIGH IMPACT	2021	Module = \$7500. Re-implement GP Permitting Module.SDR funding for \$6500. Savings in processing time will offset costs. Implementation time and cost estimated at 30 hours per staff.	CloudPermit is now in place.	Completed	Don
3.2.9 Undertake Records Management training and consider File Hold or other document management system.	Undertake Records Management training and ensure adherence to by-laws. Immediate attention and Corporate-wide leadership role should be formalized and support provided. Consider File Hold or other document management system.	HIGH EFFORT,HIGH IMPACT	2020	Estimated at \$15 per user per month. Training estimated at 30 hours. Consider digitizing old records over three years.	Records management training was provided to all office staff. A document management system is being looked at as part of overall Tech Program; will likely be a part of Office 365 implementation using SharePoint.	Paul and Martina have been meeting with vendors of O365 and SharePoint to get a better understanding of implementantions and best practices.	Elana, Paul, Martina
3.2.10 Shift Fire Burn Permits to 24/7 on-line system	Shift Fire Burn Permits to 24/7 on-line system with consideration of appropriate revenue recovery – self serve option with mobile app alerts.Burnpermits.ca - This implementation is underway.	LOW EFFORT,HIGH IMPACT	2020	Internal time to set up - 2 days staff time. Recoveries to offset cost of software and time spent.	This project has been implemented and is working well.	Completed	Chuck
3.2.11 In concert with the MESH implementation, develop and document processes, training and integration.	In concert with the MESH implementation, develop and document processes, training and integration. Undertake financial reporting changes to properly track costs. Some changes to the current project accounting, fixed assets and equipment is required for the MESH implementation.	HIGH EFFORT,HIGH IMPACT	2020	Significant time in manual work orders eliminated and better regulatory compliance, capacity savings at 5 hours per week per manager/lead hand.	Complete	Senior staff provide training to all staff on how to use system and the process for the use of the system.	Jake and Chris
3.2.12 Digitize Level of Service and MMS	Digitize Level of Service and MMS with MESH Form developer and integrate into daily work order management.Minimum Maintenance Standards and CVOR must be tracked. The paper processes would be eliminated and better reporting available for compliance.	LOW EFFORT,HIGH IMPACT	2021	Potential for improved staff relations - cost will depend upon result. Difference between two rates.	Complete	Senior staff provide training to all staff on how to use system and the process for the use of the system. MESH has replaced many paper reports. CVORs are being processed through online Ministry portal.	Jake and Chris
3.2.13 Re-implement Bookking and integrate with Diamond. Launch the public online facility bookings	BookKing will allow for better management and improve utilization of the community centres. The launch of the public site will not only provide better service, staff workload can be better managed through the use of the services module. This module provides "set up" requirements for any particular event. BookKing could be used for other appointments at the front counter. Consider "packages" to simplify bookings. Possible events with catering and weddings?	HIGH EFFORT,HIGH IMPACT	2021	Internal costs estimated at 40 hours but reduction over 3 years will offset time.	Mike and Tara have met with Bookking to improve usability. Council approved new fees and facility use has been increasing. New insurance program in place. Review of bar and catering as they were loss leaders	Continue to optimize floor and ice rentals. Continue to floor Ice Allocation Policy.	Mike and Tara
3.2.14 Update contracts, outsourcing with improved AR policy.	Contracts and AR policies should require "pay before you play". For large groups, update the contract and policy to require monthly payments in advance. If the public site is launched, reminders can be set up. Allow for credit card payments which may require fee bylaw adjustment. Integrate BookKing with GP and move all AR management to Finance and run out of GP.	LOW EFFORT,HIGH IMPACT	2020	Internal costs estimated at 24 hours but recoveries and elimination of manual work will offset.	Policy has been drafted and presented to Council who deferred a decision at this time.	Discuss with Council in 2023	Paul and Mike
3.2.15 Move AR to finance.	Move AR to Finance. Recreation to continue to collect funds at the outset but any outstanding AR to be managed by Finance in GP.	LOW EFFORT,HIGH IMPACT	2020	Internal costs estimated at 30 hours but recoveries and elimination of manual work will offset.	AR currently rests with the Finance Department	Completed	Finance

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3.3.1 Develop processes and undertake training prior to implementation. Ensure Mobile Technology is available for use in the field.	Basic technology training will be required before full MESH implementation for many of the staff. Similarly for building/bylaw services - enhanced abilities for inspections and production in the field.	HIGH EFFORT,HIGH IMPACT	2021	Estimate of Mobile purchases and training. 20 hours per staff. But significant savings and improved MMS.	Training and implementation for field work is ongoing. Office staff all have laptops, updates to cellphones, PW staff have tablets for MESH.	Office 365 will enhance mobile capabilities	Jake
3.3.2 Expand Utilization of Diamond, Booking with training and re-implementation of permitting.	Diamond and Booking are underutilized. In particular, integrations, document management, workflows and e-services. Permitting, bank reconciliation and smartlists should be reimplemented and documented. Additional training for all staff should be provided.	LOW EFFORT,HIGH IMPACT	2020	Investment in Training 20 hours for 5 staff offset by savings in time.	Work with Tammy is underway on this project.	Once implementation is complete, will optimize yearly training hours provided in Centreal Square contact to train staff.	Paul
4.1.1 Modernize Budget Process and move to multi year/long term financial planning.	As part of 2021 Planning Cycle, 1. develop business plans across departments in line with Term of Council Strategic Plan. 2. Implement Multi-Year Budgeting. 3. Department heads should develop and present their own budgets starting with past achievements, upcoming business plans, performance metrics and funding required.	HIGH EFFORT,HIGH IMPACT	2020	Staff time to develop new approaches. Cost unknown.	1. Partially complete, will be implemented further during the 2023 and 2024 budget when the next strategic plan is completed. 2. The 2023 Budget will aim to provide longer term capital budgets (5-10 years). Operating will stay at 1 year for now. However, the Operating impacts of capital projects will be identified where possible. 3. Complete - can enhance performance metrics	Completed	Paul
4.2.1 Procure Budget Software to improve budget process and reporting. Look at joint project with County.	Budgeting software allows for development and enhancement of the transparency of the budget process. The current process is highly labour intensive and requires working with excel spreadsheets, powerpoint documents which are not quickly changed. The financial results and reports are not accessible to the department heads. Budget software allow for real time access to detailed data without access to the financial system.	HIGH EFFORT,HIGH IMPACT	2021	Module cost \$25k. Savings are currently unknown as it is unclear how much time is spent on reporting. Training and set up time 30 hours for Treasurer, 10 hours per SM	Currently using an advanced Excel model.	It is the goal to implement budget software but low priority as the Excel Model is a good substitute. Will be a 2023/24 project.	Paul
4.2.2 Update Recreation Master plan (joint) and develop performance indicators in interim.	Recreation master plan has not been actioned due to foundational issues. No targets in place.	LOW EFFORT,HIGH IMPACT	2021	Internal resources	New Committee to be meeting over summer and bring ideas for budget 2023.	Ad-Hoc Committee provided a request to Council to be decided as part of Budget.	Mike
4.3.1 Develop a full set of financial policies commencing with a financial control policy.	Policies should include the full range of financial services. Review list suggested in Appendix.	HIGH EFFORT,HIGH IMPACT	2021	Internal resources - likely 2 months of work.	In progress with Finance Team.	New Procurement Policy is in place. Will continue to develop new policies for finance functions.	Paul
4.3.2 Implement the E-Bank reconciliation module	Implement the E-Bank reconciliation module and change processes for weekly reconciliations by downloading from the bank. Bank reconciliation module is "automatic". Most large organizations can reconcile in as little as two hours.	HIGH EFFORT,HIGH IMPACT	2020	Internal resources - 2 months of work.	Staff are in contact with GP regarding a quote on the module and implementation requirements.	Module in place, needs to be implemented.	Carol-Anne and Paul
4.3.3 Move Insurance and procurement responsibilities to Finance.	Insurance should be part of the risk management framework and updated based upon the TCA listing each year. Procurement currently rests at the CAO level. Segregation and recognition of liabilities is required by the Treasurer.	LOW EFFORT,HIGH IMPACT	2020		Documentation has been submitted and 2023 insurance is in place.	Finance has taken over the administrative process, Corporate will handle the strategy and review.	Paul and Elana

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4.3.4 Develop a Corporate Accounts Receivable policy and centralize AR in Finance.	Monthly reconciliations and collections activities should be done for all services by Finance to ensure that all assets are recognized and managed.	LOW EFFORT,HIGH IMPACT	2020		Has been centralized with Finance.	Policy needs to be created.	Paul
4.4.1 Undertake time tracking against planning applications - fee study.	Undertake time tracking against planning applications – eliminate subsidizing by taxpayers.Planning applications are not cost recovery. With the outsourcing of planning specialist, staff and consultants should track time against each application.	LOW EFFORT,HIGH IMPACT	2020	Time estimated at 2 hours per week. Cover by fees	Fee study was completed and new fees are in place. Cost recovery is unachievable in current market.	Due to changes in Bill 109 new fee study and model will be required.	Christina and Paul
4.4.2 Undertake fee study and policies on subsidies.	Fees are not recoverable - need to know the "right fee" based upon cost and determine the subsidies that may be applicable. Need to build reserves for years where permits and planning approval processes are not covered.	HIGH EFFORT,HIGH IMPACT	2022	Could be done in house or by a consultant. However, staff need to track time against activities. Increased revenue offset cost.	New Model is active.	Due to changes in Bill 109 new fee study and model may be required.	Don and Elana
4.4.3 Develop advertising and donation programs.	May need to delay for two years due to COVID. Advertising boards, facilities can be very lucrative.	LOW EFFORT,HIGH IMPACT	2022	Assumes \$10k per year	Currently being investigated. Cotinuous delays with implemtation due to pandemic.	2023 will be the first year not affected by Covid related shut downs. Staff are working on bringing a program forward.	Mike and Elana
4.4.4 Change fee structure to include deposits and increased securities.	Following the clean up of the backlog, there is an opportunity to increase revenues on a fee for service basis. Similar to the Septic inspection program initiative.	HIGH EFFORT,HIGH IMPACT	2022	Liability of outstanding hours of 700*3 hours per permit needs to be eliminated before pursuing.	Fees for deposits on planning applications have been increased to reflect the market.	New planner is in place (Christina) review of the fees will be conducted in 2023 in light of new provincial planning timelines and requiremend under Bill 109	Martina and Christina
4.4.5 Revenue recovery through third party programs –insurance	There are third party services that can assist in managing these claims.	HIGH EFFORT,HIGH IMPACT	2020	Staff time to be allocated - Need to assess how many hours. Required depending upon the players involved.	New agreements are in place with MTO for revenue recovery. Staff recommend that this remains an internal process.	Completed	Chuck
5.1.1 Procure and implement a comprehensive Service Request Software with online submissions linked to work orders.	Service requests and complaints online (eg. Access E11)	HIGH EFFORT,HIGH IMPACT	2021	Included above	Staff have met with Access E11 and the program is not the right fit for Township. Township is moving forward with Virtual City Hall	Virtual City Hall is on hold, cost are high and uptake in neighbouring communities has been low. New Complaint Policy and Customer Service Policy are in place.	Elana, Paul, Martina
5.2.1 Enhance public engagement and communication through the Township website,social media, software additions along with e-services applications.	Communications with public and staff strategy for ongoing and projects should be developed including social media, newspaper, other modes.	HIGH EFFORT,HIGH IMPACT	2021	Part of Website project. Contemplate Consultant to assist	New website has launch, received positive feedback from public. Provides citizens to subscribe to receive custom news letters	Continuing to work on engagement, each department manages their own sections on the website.	Martina
5.3.1 Allocate financial resources (summer student – communications) to creation of on-line resources for public education purposes.	Should be done in concert with other initiatives.	HIGH EFFORT,HIGH IMPACT	2021	Student for 4 months.	Opportunities are being pursued via grant funding.	Intern is in place for Jan to April 2023, will draft examples	Martina and Elana

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5.3.2 Update Website & Information	Website being revamped. Look to implement from the VOICE OF THE CUSTOMER.	HIGH EFFORT,HIGH IMPACT	2020	Part of Website project.	New website has launch, received positive feedback from public. Provides citizens to subscribe to receive custom newsletters. Culture of continuous improvement	Completed	Martina and Don
6.1.1 Redesign office space for better utilization, location of staff with operational requirements. Assign Facilities Management to the CBO or Manager of Public Works	Administrative staff to be located near manager. Recreation manager to be located at the CC. Hotelling opportunities in the Township Hall following COVID.	HIGH EFFORT,HIGH IMPACT	2020	Some reconfiguration required.	Building and Planning Departments have moved to lower level of Town Hall. Additional movement will occur as staff complement is filled.		Elana and Management
6.2.1 Conduct a building condition assessment of the Community Centres to determine cost and "fitness" for alternative solutions.	Prior condition assessments did not include arenas. Before determining the next step, it is imperative to understand the state of these buildings.	HIGH EFFORT,HIGH IMPACT	2022	External Consultants	Greenview has conducted the assessments.	Waiting on final report.	Elana and Paul
6.3.1 Undertake a facility strategy including Recreation in concert with shared service review.	Fire and PW both have facility challenges. A fullsome approach including recreation should be undertaken before any decisions made. However, it is clear that the Township cannot continue to utilize these facilities for the long term.	HIGH EFFORT,HIGH IMPACT	2021	Review already underway.	Application for funding for Douro Public Works building was successful and renovations are underway to join with Fire Department. New funding model approved for Warsaw Joint Building and new funding received for Douro Parks.	Continue to work on these project and explore new funding opportunities.	Management
6.3.2 Update the Fire Master Plan (perhaps joint) to assist with challenging decisions pertaining to fire halls and equipment needs.	Fire Master Plan is outdated. Should be updated based upon the new requirements. It is a decade old and new organization exists.	HIGH EFFORT,HIGH IMPACT	2021	Consultant fees or could be done in house.	Delayed to 2023 due to department enhancements	Will be part of budget in 2023, third party will be required to complete the study.	Chuck
6.4.1 Increase utilization rates and reduce Recreation costs.	See above Track utilization and costs. Review fee schedule and utilization gaps.Review Recreational Program Options. Undertake a study to determine uptake and re-purpose, expand use of the Warsaw Arena.	HIGH EFFORT,HIGH IMPACT	2020	Internal - 1 hour per week	Increase Utilization Rates and Reduce Recreation Costs – Initial report on this went to Council in September 2020.	2023 will be the first year not affected by Covid related shut downs. Will be revisiting.	Elana, Mike and Paul
7.1.1 Recruit a Project Manager with oversight for AM/IT and the Edwards Pit. This cannot rest in Finance.	As discussed, Township requires corporate view of major projects.	HIGH EFFORT,HIGH IMPACT	2020	Included above	Will be revisited as required.	On hold as all projects are being managed in house,	Elana
7.2.1 As required by 588/17, the Asset Management Plan is required by 2022.	PSD has been engaged for \$124k. It is important to note that this does not include condition assessments.	HIGH EFFORT,HIGH IMPACT	2020	Consulting fees of \$124k -FCM Funding provided - Internal costs of 120 hours per department.	Work is underway with Public Sector Digest on the update of the Asset Master Plan. Roads Need Study with Condition Assessments is complete.		Finance staff and Jake
7.3.1 Form a Corporate AM team to develop process maps and procedures to ensure costs are capture and AM practices are embedded into daily practices.	As required by 588/17, lifecycle management strategy is required by 2021. Form a Corporate team to develop process maps and procedures to ensure costs are capture and AM practices are embedded into daily practices.Processes are needed to ensure that AM practices are part of daily practices and are integrated into the lifecycle management of assets as opposed to a year end exercise.	HIGH EFFORT,HIGH IMPACT	2020	Approximately 1 hour per manager per week	As part of PSD AM update project all Managers are being trained in AM and how it affects their tracking of assets.		Finance Staff

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7.4.1 Develop long term plan for gravel roads including possible conversion.	Service Levels challenged, particularly for gravel roads. Develop long term plan surrounding gravel roads. Monitor complaints and service requests including time, materials and equipment – develop dashboards for LOS purposes.As provided in this report, we have estimated that gravel coversion will be approximately \$11-22 million. This should be taken into account when setting levels of service.	HIGH EFFORT,HIGH IMPACT	2021	Estimated conversion costs \$11-22 million.	10 year forcast based on Council direction.	Continue to work through project as funding is available.	Jake
7.4.2 Update Roads Need Study prior to 2021 AMP requirements	An update is needed for 2021	HIGH EFFORT,HIGH IMPACT	2021	Consulting fees to update condition.	Roads Need Study with Condition Assessments is complete.	Completed	Finance Staff
7.4.3 Evaluate the Edwards Pit extensively including costs/savings over long term and internal capacity.	Review is needed to ensure that the Township will reap the rewards of this Pit. It may wish to outsource the management. We understand that the Township has engaged two consultants to assist.	HIGH EFFORT,HIGH IMPACT	2021	Consulting fees for assessment offset by savings.	Agreement in place to be completed by December 2023.	Staff is working through the required conditions and will report to Council.	Elana, Jake and Martina