



Date:	05/11/2020
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Meeting Date:	November 9, 2020
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TOWNSHIP OF BROCK

Organizational Review

(Municipal Modernization Program)

Final Report

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November 2020

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A CONFIDENTIAL – “As Should Be” Organizational Design

Preamble

Performance Concepts was retained by the Township of Brock in to undertake an Organizational Review under the Province's Municipal Modernization Grant Program.

The COVID-19 state of emergency has impacted the execution of the Brock organization review. Council interviews, staff interviews and stakeholder consultations were executed using online platforms with a limited scope for interaction compared to our team's preferred face-to-face interactive approach pre-COVID-19.

While COVID-19 has impacted the execution of this Review, it has not compromised the validity of our independent 3rd party Findings and Recommendations contained in this Final Report. The Performance Concepts team is confident that this report meets all the RFP deliverables set out by Brock and satisfies the requirements of the Province's Modernization Review Funding Agreement.

Finally, Performance Concepts acknowledges the grit and resilience of Brock Council and staff in moving this important project forward while simultaneously coping with the operational and public safety challenges posed by the pandemic.

Executive Summary

The 2020 Brock Modernization Review has been successfully executed by the Performance Concepts team. This Final Report documents Brock's "As Is" service delivery model organizational structure and delivers a range of "As Should Be" performance improvement recommendations. These recommendations have been phased according to a *Do Now-Do Soon-Do Later* Implementation Roadmap.

The imperative for Brock's Modernization Review to generate significant/transformational change is demonstrated in the figure below. Post-COVID debt levels are going to re-define the Province's financial relationship with municipalities.

The COVID-19 New Abnormal: Crushing Senior Government DEBT Loads

- The Province forecast a 2020-21 deficit of \$21 BILLION in March
- The Fraser Institute predicted the deficit will be \$29 BILLION
- The Province's independent Financial Accountability Officer has predicted a \$41 BILLION deficit
- The Province is looking at the Municipal Modernization Program to source significant \$ savings.
- Is the Township of Brock ready to embrace significant change to buffer upcoming fiscal turbulence?

The Province's mandated asset management program (O Reg. 599/17) poses a second financial challenge for Brock. Brock's three single-pad arenas are fast approaching the end of their useful life cycles. Replacement of these "status quo" assets is unaffordable and operationally inefficient.

An Additional Pressure: Reg 588 ASSET MANAGEMENT

- By 2023 the Province has mandated ALL municipalities as follows:
 1. Establish asset inventories + condition ratings
 2. A life cycle/service level assessment needs to be completed for each facility/asset class
 3. Municipalities will have to budget for replacement of assets according to their life cycles
- Brock's status quo inventory of assets may not be affordable
 - E.g. 3 arenas (at end of lifecycle) for 12,000 people
- Brock cannot rely on existing reserves to fund its capital program indefinitely
- Decisions over asset/facility service levels can no longer be deferred
- Decisions are imminent (by 2023)

Performance Concepts has provided arena consolidation options for Brock that will secure multi-million-dollar cost avoidance, while maintaining appropriate service levels. Implementing arena consolidation will have an impact on required staffing levels and Brock's "As Should Be" organizational design.

Potential Capital Cost Avoidance Return on Investment (ROI) – ARENA CONSOLIDATION

	Three Single-Pad Arena Status Quo	One Twin-Pad Arena Standard Construction	One Twin-Pad Arena Fibre/Membrane Construction
Asset Management Capital Replacement Cost	\$7.2 M – \$8.7 M per pad \$21.6 M – \$26.1 M total	\$0	\$0
New Capital Cost \$	\$0	\$14 M – \$19 M Total	\$8 M Total
Cost Avoidance Efficiency \$	\$0	Up to \$13.1 M potential cost avoidance	Up to \$18.1 M potential cost avoidance

The scope of the Modernization Review was expanded to include a working session with Council to develop a consensus around Strategic Priorities. Council's clearly articulated Strategic Priorities have informed/shaped our team's 3rd party evidence-based recommendations around service delivery and organizational design.

Council Strategic Priorities – adopted on July 27, 2020

Council Strategic Priorities:

1. Generate Improved Value for Money (Taxes)
 2. Sustainable Human Resources (Staffing) model
 3. Rationalized Asset Management + Facilities Model
 4. Timely & Accountable Customer Service Response and Reporting to Public & Council
- **Council can now function as a Board of Directors and relinquish operations to the aligned staff team headed by a new CAO with a clear and measurable “results mandate”**

As part of this Review Performance Concepts has designed a Brock Services Inventory that documents all municipal forward-facing services and corporate support functions. (see following figure)

FUNCTIONS – Service Inventory and Classification of Service Clusters

Township staff provided a baseline “Service Inventory” – tasks, functions, job descriptions, services, etc.

Performance Concepts categorized this inventory into Service Clusters with each cluster or service further identified as:

1. **INTERNAL SUPPORT FUNCTIONS**
 - These services, tasks or functions were predominantly provided by the department to other departments or staff (e.g. Human Resources, Payroll, Training, etc.)
2. **FORWARD-FACING with a USER SPECIFIC BENEFIT**
 - These services would be ones where individual residents or specific groups benefit (e.g. Building Permits, Cemetery Administration, Recreation Programming)
3. **FORWARD-FACING with a PUBLIC or GENERAL BENEFIT**
 - These services are provided to the public at a level set by legislation or Council directive with a benefit enjoyed by the public at large (e.g. Winter Road maintenance, Park maintenance, Fire and Emergency Services)

This Categorized Service Inventory was then validated by the Township’s department heads.



The Services Inventory was used by Performance Concepts to re-design Brock’s organization based on the principal of *Form Follows Function*. The restructured organization will improve line-of-sight for individual employees and promote cross-departmental (horizontal) priority-management. A suite of potential Key Performance Indicators is included for each of Brock’s forward-facing public services.

All of the Performance Concepts team’s recommendations are included in an Implementation Roadmap with clear *Do Now*, *Do Soon*, and *Do Later* timing priorities. Organization design recommendations include a *Transitional* stage on the way to a final *Mature* organizational structure.

A recommended 3rd party progress assessment in Q4 of 2021 will ensure Brock’s change roadmap has achieved the necessary momentum to secure the cost avoidance and performance improvement benefits set out in this Final Report.

3.0 Introduction

3.1 Introduction & Context for the Modernization Review

The Township of Brock is a local municipality located at the northern end of Durham Region. Governed by a municipal council of seven, the Township's current organizational structure consists of a Chief Administrative Officer (CAO) with 5 departments. The Township employs 39 full-time and 10 seasonal part-time/casual employees and relies on over 70 volunteer fire fighters.

Brock's five Departments are as follows:

- Public Works
- Building & Planning
- Clerks (includes By-Law)
- Fire & Emergency Services
- Finance

Brock's RFP for the Review required an analysis of the current organizational structure as it relates to departmental/staff responsibilities and current workload. The review was to include options and recommendations to ensure efficient and effective delivery of services and address anticipated service delivery requirements over the next 5-10 years.

3.2 Provincial Fiscal/Budgetary Realities

The Province's Municipal Modernization Grant Program pre-dates the COVID pandemic. The originally stated intent of the Modernization program is to support municipalities that are committed to identifying and implementing service delivery efficiencies. Modernization Review service delivery efficiencies are best measured by using a blend of the following performance lenses:

- Operating cost reduction/cost avoidance secured while maintaining an existing level of service
- Capital cost reduction/avoidance secured via rational asset/facility management decisions
- Process execution/staff productivity improvements secured via LEAN process streamlining and IT driven service delivery innovation
- Burden sharing of staff positions, specialized equipment, IT systems and facilities with neighbouring municipalities.

Pre-COVID, public statements by the Premier indicated that Municipal Modernization Program efficiency dividends of 4% -5% were expected. The Province's Municipal Modernization Program was conceived to secure *incremental \$ efficiencies* across the municipal sector. Pre-COVID, the Province's incremental improvement model for the municipal sector seemed reasonably scaled and achievable.

But now in the midst of the COVID *new abnormal*, the stakes attached to Municipal Modernization reviews have changed dramatically. Transformational change is the new Modernization objective - necessitated by the new fiscal realities of the Provincial-municipal relationship in Ontario.

The figures below are instructive in this regard.

The COVID-19 New Abnormal: Crushing Senior Government DEBT Loads

- The Province forecast a 2020-21 deficit of \$21 BILLION in March
- The Fraser Institute predicted the deficit will be \$29 BILLION
- The Province's independent Financial Accountability Officer has predicted a \$41 BILLION deficit
- The Province is looking at the Municipal Modernization Program to source significant \$ savings.
- Is the Township of Brock ready to embrace significant change to buffer upcoming fiscal turbulence?

Figure 1 - Provincial Debt

Provincial Funding Sources the Brock Relies On

Provincial contributions to Brock:

<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019*</u>
\$1,305K	\$1,204K	\$2,189K	\$2,928K

*725K modernization one-time grant

From the current 2020 Budget:

• Ontario Community Infrastructure Fund	\$ 877K
• Ontario Municipal Partnership Fund	\$ 412K
• Miscellaneous Grants	\$ 50K
	<u>\$1,339K</u>

Figure 2 – Brock Reliance on Provincial Grants

3.3 Asset Management Pressures and Ontario Reg 588/17

The Province has mandated a new sustainable asset management model for phased adoption across the municipal sector. By 2023, Ontario municipalities must implement the following asset management deliverables:

1. Comprehensive asset inventory.
2. Asset condition ratings.
3. Measurable asset preservation service levels (i.e. asset quality to be maintained over time).
4. Sustainable life-cycle asset management maintenance/capital program.
5. Sustainable rehab/replacement financial plan to maintain service levels & implement life-cycle program.

O Reg 588/17 mandates “good government” sustainable asset management practices and accountable stewardship of taxpayer-funded public assets. Municipalities will no longer be able to “kick the can down the road” by eroding asset quality over time in order to avoid politically or financially difficult life-cycle capital funding commitments. Much work remains to be done by Ontario municipalities (including Brock) to meet the requirements of Regulation 588/17 by the 2023 deadline.

The likely impacts of a crushing Provincial debt load on future grant levels and the O Reg. 588/17 deadline are creating a budgetary “pincer” that will compel Brock to implement aggressive cost-avoidance and operational efficiencies. Transformational change will be required moving forward in order for Brock to achieve Council’s strategic priorities.

4.0

Modernization Review Methodology

4.1

Doing the Right Things. Doing Things Right.

An effective Modernization Review addresses two fundamental/overarching objectives as per the figure below.

1. Accountable and innovative Municipalities strive to ensure they are ***Doing the Right Things***
2. Accountable and innovative Municipalities strive to ensure they are ***Doing Things Right***

Principles for Efficient Service Delivery



Figure 3 - Doing the Right Things, Doing Things Right

Brock's Modernization Review has addressed ***Doing the Right Things*** via the creation of a go-forward Services Inventory. The Services Inventory will position Brock to develop Key Performance Indicators and establish efficient service pricing and quality targets moving forward.

Brock's Modernization Review has addressed ***Doing Things Right*** imperatives by aligning *organization form* with *service delivery function*. The Review has also delivered game-changing recommendations around Arena consolidation that offer multi-million-dollar cost avoidance dividends to Brock taxpayers.

4.2 Documenting Brock's "As Is" Organizational Model

The Performance Concepts team has executed a wide-ranging evaluation of Brock's "As Is" service delivery model and organizational structure. The "As Is" evaluation has included operational practices and processes, staffing levels, staff deployment/scheduling models, information management systems, spending profiles, and facilities design/adequacy. Organization structures for all Brock departments have been subjected to a "deep dive" examination.

4.3 Consulting with Brock Staff and Council

A comprehensive series of staff interviews have been executed. Small group facilitated working sessions were also executed with the By-Law/Canine team as well as Public Works. These interviews and facilitated working sessions have focused on "As Is" strengths/weaknesses and go-forward performance improvement opportunities.

Ongoing dialogue with the acting-CAO and Clerk has informed the identification of performance improvement/cost avoidance opportunities by the Performance Concepts team. Two employee surveys were conducted: one for full-time staff and one specific to Township firefighters. The employee surveys were used to validate our team's "As Is" evaluation and support our investigation of "As Should Be" performance improvement opportunities.

Council interviews addressed operational performance improvement issues and governance "change" priorities. These interviews with individual Council members revealed an opportunity for Council to articulate a common set of Strategic Priorities. A working session with Council confirmed a concise set of Strategic Priorities that have informed the execution of this Review and its go-forward set of Do Now/Do Soon/Do Later recommendations.

4.4 Service Inventory and Key Performance Indicators

Performance Concepts has worked with the Brock staff team to design a Services Inventory. The Services Inventory documents Brock's forward-facing public services and internal corporate support functions. Forward-facing services have been categorized according to benefits delivered - either a General/Public or User-Specific benefit. Potential Key Performance Indicators (KPIs) have been provided for Brock's forward-facing services. Once these KPIs have been properly implemented/populated, Brock can use them to establish future performance targets to drive efficiency and quality improvement.

4.5 Designing Brock's "As Should Be" Service Delivery Model & Organization Design

The "As Is" evaluation, Council and staff consultations, the Services Inventory/KPIs informed the development of "As Should Be" performance improvements re. service delivery and organizational design.

4.6 Peer Municipal Case Studies

The Performance Concepts team has developed several case studies documenting client municipalities "lessons learned" after executing municipal modernization reviews. These case studies address technology modernization, business process streamlining and rational facility consolidation. Our work in Brock has been informed by these cases and the performance improvement lessons learned.

4.7 Stress-Testing of Draft Recommendations

A draft package of performance improvement Recommendations has been stress-tested with Brock's new CAO and the Township's staff leadership team. Stress-testing feedback has informed the Final Report's Recommendations, without compromising the objective 3rd party "truth to power" approach taken by the Performance Concepts team.

4.8 Finalizing Recommendations and Building the Implementation Roadmap

An evidence-based set of Findings/Recommendations has been prepared by Performance Concepts and is featured in this Final Report. An Implementation Roadmap has phased our Recommendations into Do Now (2020/2021), Do Soon (2022) and Do Later (2023 and Beyond) timeframes.

4.9 Final Report to Council

This Final Report and a supporting presentation complete the Brock 2020 Modernization Review. Following receipt of this Final Report, the CAO can close-off the project with the Province as per Modernization Grant Program requirements.

5.0

Consultations

Performance Concepts used its interviews and consultations with staff and Council to validate the “As Is” findings and to inform the “As Should Be” recommendations. The following provides a summary of those consultations and the outcomes.

5.1

Council Interviews and Strategic Priorities

Performance Concepts interviewed the Mayor and all members of Council. These interviews confirmed that Council had not yet developed *Strategic Priorities* for the current term (2018-2022). Councillors recognized the need to establish a consensus around end-of-term accomplishments that could serve as a rallying point and provide Brock with governance focus.

5.1.1

Individual Councillor Concerns/Potential Priorities

During one-on-one interviews, Performance Concepts asked each Councillor what their priorities and issues were for the current term of Council and beyond.

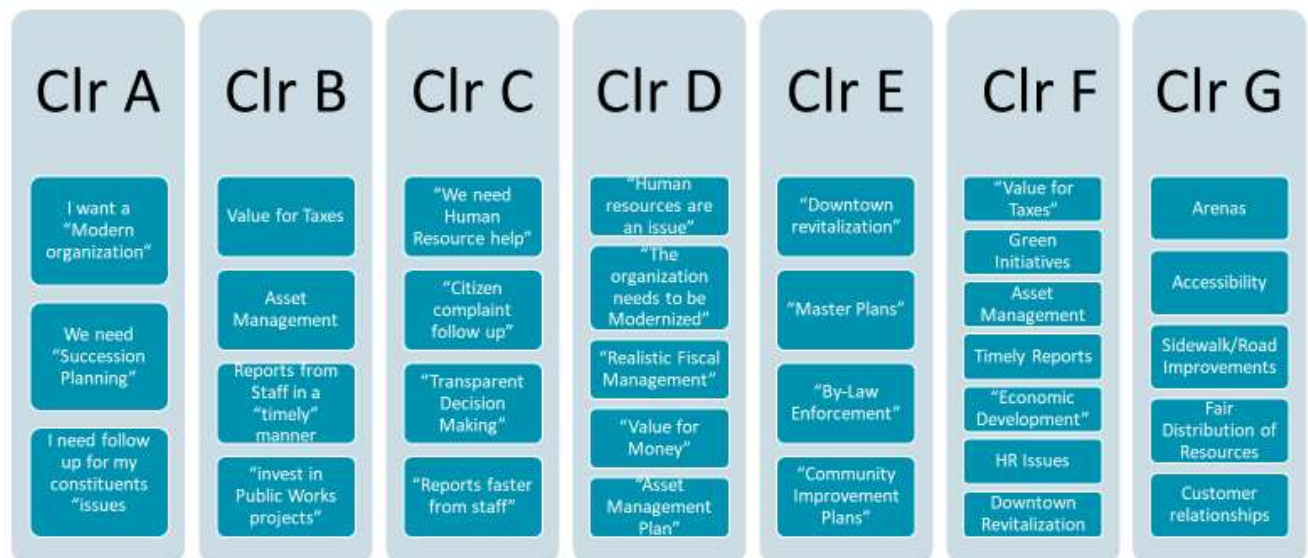


Figure 4 - Council Interviews: Concerns and Issues

As interviews proceeded it became clear that common themes were emerging which could form the basis for a set of go-forward *Strategic Priorities*. To demonstrate the evolving consensus re. objectives/accomplishments, Performance Concepts categorized Councillor comments in a word cloud. The relative size of a given word/phrase represents how many times the comment or theme was mentioned by Councillors - a barometer of consensus.

The following word cloud demonstrated the emerging common priorities of Brock Councillors:



Figure 5 - Word Cloud of Emerging Priorities and Issues

5.1.2

Council's Strategic Priorities

Performance Concepts presented the results of the individual Council Interviews to the entirety of Council at a working session on July 27, 2020. At the end of the working session Council unanimously passing a motion to endorse the following *Strategic Priorities*:

- 1) Generate Improved Value for Money (Taxes)
- 2) Sustainable Human Resources (Staffing) model
- 3) Rationalized Asset Management and Facilities Model
- 4) Timely & Accountable Customer Service Response and Reporting to Public and Council

With these Strategic Priorities set, Brock Council can function as an effective Board of Directors and delegate operations to the aligned staff team headed by a new CAO provided with a clear and measurable “results mandate.”

Performance Concepts execution of this Organizational Review has been deeply informed by Council's Strategic Priorities. Our recommendations are consistent with Council's unanimous resolution.

5.2 Staff Interviews and Working Sessions

Performance Concepts initiated the Review with a kick-off meeting with the Senior Leadership team. The kick-off meeting included a Mentimeter.com working session to gauge/explore Brock's appetite for change and willingness to be bold in considering transformational recommendations.

The kick-off meeting was followed up by one-on-one interviews with selected Brock staff. The following staff members were interviewed:

- Director of Finance/Treasurer
- Director of Public Works
- Chief Building Official
- Fire Chief
- Clerk
- Acting-CAO
- Planner
- Facilities Coordinator
- Deputy Fire Chief
- Tax Collector
- Public Works Coordinator

Additional small group working sessions were held with:

- Public Works
- By-Law/Animal Control

5.3 Brock Staff Surveys

Performance Concepts conducted two on-line employee surveys to garner staff opinion on a range of service delivery, organization design, and workplace culture issues. Detailed survey results have been provided to the CAO on a confidential basis – thereby ensuring frank commentary will not be publicly linked to any identifiable staff member.

Each Brock employee was provided with an opportunity to comment on any/all Departments - enabling the Performance Concepts team to gain valuable cross-departmental perspectives. Recognizing the unique/limited relationship that on-call paid firefighters have as Brock employees, a separate survey was conducted for them. A total of 22 survey responses were received from full-time Brock staff and 26 survey responses from firefighters.

5.3.1 Brock Staff Survey - Highlights

Using a Disagree/Agree scale of 1-5, Brock staff largely agreed that services were being delivered in a timely/responsive, effective manner that provided value for money. When asked whether services were adequately funded staff neither agreed nor disagreed, but when asked whether services were adequately staffed staff disagreed somewhat.

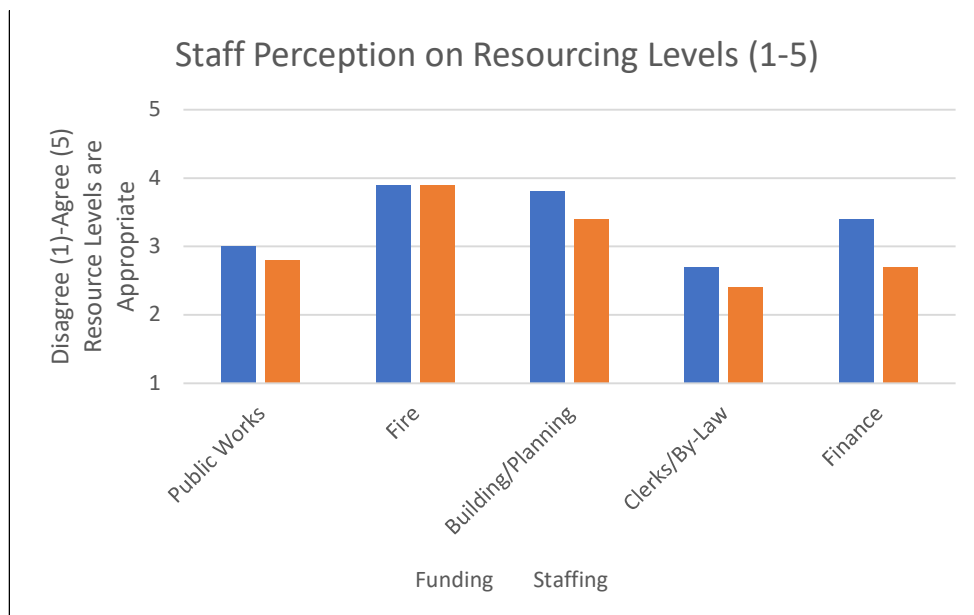


Figure 6 – Staff Perception on Resourcing Levels

Brock staff were also asked their perception of how Council, the public and staff themselves felt Departments were doing in meeting or exceeding public expectations. Results varied by Department. While staff across all Departments felt they were meeting or exceeding public expectations, both Public Works and Clerks/By-Law staff felt that Council and the Public would say otherwise.

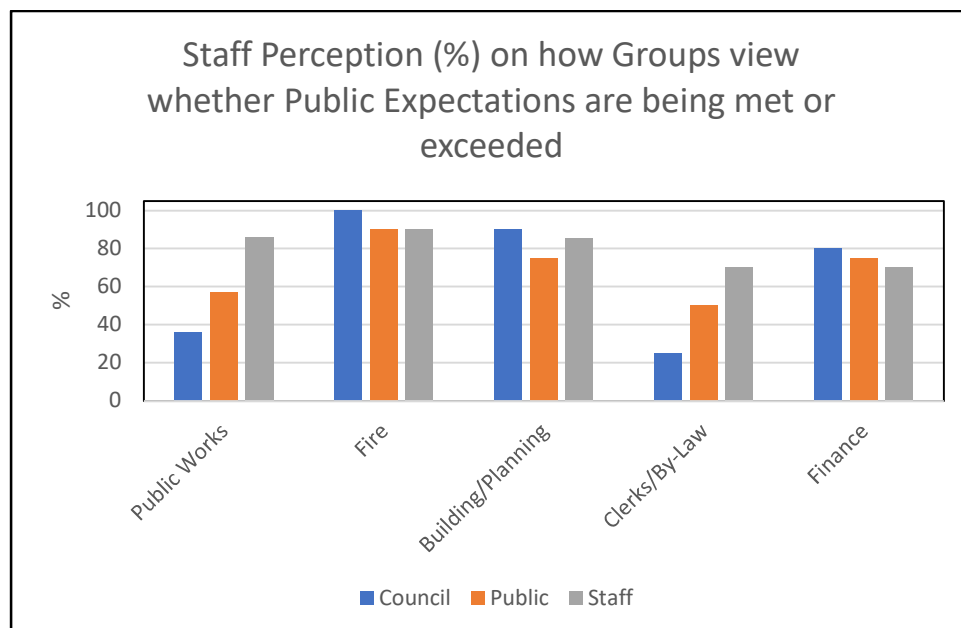


Figure 7 - Staff Perception (by Group) on whether Public Expectations are being met or exceeded

Prevailing survey response themes around improving service delivery included the following:

- Need for more modernized and effective processes: more automation, electronic work order management, customer complaint monitoring, electronic file management, KPI dashboard, reducing records duplication, reducing paper processes and filing.
- More on-line public access to information, applications, payment processes, etc.
- Additional staff needed, especially with an administrative/support focus.
- Having Council and senior staff “on the same page”. Reducing focus on Council special requests as these prevented essential work from getting done. Consistent respect from Council and clear direction on their expectations.
- Improved inter-office communications.
- Stable leadership starting at the top. Clear understanding of roles and “chain of command”.

Staff described their employment at the Township as “challenging, frustrating, hectic and stressful”, balanced by positive responses of “educational, rewarding and enjoyable”. Similarly, they felt their ideal experience in the workplace should feature “teamwork, and be enjoyable, rewarding, fulfilling and organized”. A final comment supported these views: “Teamwork, Trust and Accountability... Work like a family. Support each other. Be responsible in carrying your own work.”

5.3.2 Firefighters Survey - Highlights

Similar to the fulltime staff, Brock firefighters reported their services were delivered in a timely/responsive and effective manner. When asked whether services were adequately funded, firefighters neither agreed or disagreed, but agreed they have a well-trained department, and the Township gets great value for its money. Firefighters were neutral on whether or not they were being adequately compensated.

Firefighting apparatus are considered reasonably new and well maintained. There was a neutral response to a question on the need to improve the mix of equipment available. The existing Fire Station locations made sense to firefighters in terms of minimizing assembly and travel time, although the proposition that the stations themselves are up to date met with a neutral response.

Firefighters report there is no problem deploying enough firefighters for Monday-Friday daytime emergency calls. However, they were neutral around deployment strength for evening/overnight/ weekend or summer vacation periods. Assembly and travel times were largely seen as acceptable, although having a sufficient number of firefighters early in the call was deemed slightly less acceptable.

For the most part, Brock firefighters agreed that the bundle of services being provided were appropriate, although ice and water rescue and the fire boat were identified as services that might not be appropriate. Medical Tiered Response calls were identified as an area where added firefighter involvement should occur.

When asked for a short phrase regarding advice for positive change moving forward, the main themes mentioned were “More Training and Better Communication”.

6.0

“As Is” Service Delivery & Organization Design Findings

6.1

Asset Management Compliance

The Province has mandated a sustainable asset management model for municipalities. O. Reg. 588/17 sets out a series of compliance deadlines:

OBLIGATIONS UNDER O. REG. 588/17

2021 Deadlines – Establish measurable service levels

2023 Deadlines – Complete Roll-out across all municipal services

Asset management is a “team sport” that involves cross-departmental collaboration and different disciplines of technical expertise. Asset management is NOT exclusively a financial reporting requirement.

A viable municipal asset management solution requires the following tools in the toolkit:

- Financial Accounting solution (PSAB + Asset Replacement)
- Maintenance Management solution (activity based linked to asset objects)
- Asset Management Software solution (life-cycle planning/analysis)

Brock Finance staff have been carrying Brock’s compliance efforts to date. A properly resourced compliance project will feature a designated internal project manager and expert outside consulting expertise. MFOA features a roster of qualified asset management consulting resources. The Federation of Canadian Municipalities (FCM) is providing grants to fund municipal compliance.

6.2

Staff Succession Planning

Talent retention and acquisition is important to any Ontario municipality seeking to implement transformational change and achieve significant performance improvement. Staff with accredited or technical competencies are in demand across the Ontario municipal community. Examples of scarce/sought after staff include Planners, Building staff, Engineering staff, CAO leaders, Municipal Finance leaders.

While Performance Concepts has not conducted an independent compensation analysis of Brock versus peer municipalities, Township staff report that compensation gaps are real and create an impediment to talent acquisition. Performance Concepts is also aware that previous staff hiring episodes have not always been executed in an accountable and transparent fashion.

Brock needs to foster an evolving working environment that provides satisfaction, secures engagement, and retains institutional knowledge moving forward. Performance Concepts endorses Brock’s decision to retain Blake-Tilly to address workplace culture challenges and create momentum around workplace restoration. Our team’s organization re-design recommendations can be integrated with Blake-Tilly workplace restoration advice to create a “momentum platform” towards service delivery improvement and productivity enhancement.

6.3 Mismatch between Senior Staff Responsibility and Functions/Priorities

The consultation tools employed by Performance Concepts (interviews + surveys) have documented a strong sense that Brock Senior Management’s day-to-day workload and assigned responsibilities are disconnected from the core functions/priorities of service delivery. Some mismatch examples follow:

- Clerks Department picks up all the loose pieces...“Everything and the kitchen sink”
- Public Works struggling with a disconnect between a restrictive *Facilities Management* approach versus an expanded *Recreation Programming* approach
- Need for improved consistency between Building Code compliance and Fire Code compliance on each side of the building occupancy decision
- Failure of By-law services to prioritize high-value enforcement workload versus lower value-added Animal Shelter passive coverage and animal care
- No workable KPIs to support evidence-based planning or accountability reporting

6.4 Sub-Optimal Staff Deployment

Performance Concepts has identified the following sub-optimal staff deployment situations in the “As Is” Brock operations model:

Arenas Staffing Model

- Arena Position titles inconsistent with duties and union status (e.g. “Managers” positions inside the bargaining unit)
- Rental revenue is decreasing while reactive maintenance spending is increasing across all three of Brock’s existing single-pad arenas
- Soft rental utilization rates for prime time and shoulder hours is the over-arching problem. There is insufficient rental demand for 3 pads in Brock.
- The absence of arena pad consolidation (i.e. no twin pads) creates a less efficient service delivery model and a staffing/maintenance model that requires more FTEs in total.

Roads/Parks Staffing

- Parks/Arena maintenance staff are imbedded in the same bargaining unit within Public Works. This creates back and forth/bumping issues despite differing required skill sets. There are also confusing workload distributions: Parks staff pick-up garbage on roads while Roads staff pick-up garbage in parks.

Bylaw Staffing/Animal Control Coverage

The following deployment challenges are noteworthy:

- There is no reliable tracking of investigation initiation timeframes or investigation resolution timeframes
- Deployment and Response Issues
- Staff deployment obligations for Start/End Day are focused on Shelter Operations
- Higher value/cost Enforcement Officers are providing low value coverage duties in the Shelter
- Staff struggling to meet Council expectations re: Parking Enforcement priorities due to staffing capacity being consumed at the Shelter

Finance Staff Skillsets and Roles

- Excessive staff transaction-based specialization needs to evolve into flexible analyst roles.

6.5 Council Involvement in Brock Operations

In the absence of KPI supported targets for Brock’s forward-facing services, Council is not able to function effectively as a governance “Board of Directors” that make decisions above the fray of day-to-day operations.

Instead Council has become immersed in operations and in-the-trenches problem resolution. When Council directs staff to address specific ad-hoc operational concerns or becomes involved in resolving specific/granular public complaints, staff are also expected to expend ad hoc effort. However, Brock staff have finite/limited capacity to expend on Council directed tasks and/or their own planned core work priorities. These two competing sets of work demands on Brock staff are creating inefficiencies, eroding focus, and impacting service delivery quality.

In an ideal division of labour, Council would focus on setting KPI performance targets for Brock’s forward-facing services and then require staff to report actual results that achieve Council’s targets. This kind of top down, measurement-driven governance role for Council is a best practice. Council can trade control for results by holding their single employee (the CAO) accountable. Council can decide on “what” is to be achieved and staff can decide “how” in terms of execution. Separate but mutually

supportive roles and lanes of influence can be created. Mutual trust develops between Council and staff as distinct roles/lanes of influence evolve.

Staff rightly note that Council sometimes make policy "on the run" and mandate new work initiatives/projects without a full appreciation of the impacts on existing operations and workload. But in fairness to Council, staff has not developed measurable results reporting/KPIs to give Council confidence around service delivery results. Until the annual budget process in Brock is tied to measurable results (i.e. a budget contract) it will be difficult for staff and Council to stick to their "best practice" lanes and maximize their respective value-added.

Fortunately, Council has now established a set of *Strategic Priorities* that can serve as a screening tool for assigning new work initiatives to staff - beyond their already budgeted core expectations. If ad-hoc work requests do not support one of the strategic priorities, then they will be positioned at the bottom of the "to do" work plan. Each ad-hoc Council request should be treated like a project. It should receive budgeted staff hours and will be positioned accordingly. Council should be prepared to bump or postpone other projects when ad-hoc requests pile up.

6.6 Current Shared Services Arrangements

The Township of Brock participates in formal and informal service sharing arrangements with neighbour municipalities. Arrangements documented below ensure Brock has timely access to a range of internal support functions that would be inefficiently supplied with internal staffing.

6.6.1 Region of Durham Support

LEGAL SERVICES

The Region provides specialized Legal Services to the Township, especially during collective bargaining. In addition, legal services/advice are available to the CAO across a range issues including real estate dispositions and sensitive human resource matters.

IT SUPPORT SERVICES

Durham Region provides IT support and service to the Township on a cost-recovery basis.

6.6.2 Fire Services Mutual Aid Agreements

Brock has Mutual Aid Agreements with the following Fire Departments:

- Georgina Fire
- Ramara Fire
- Kawartha Lakes Fire

In addition, Brock has a specific/specialized agreement with Oshawa Fire to receive dispatch, trench rescue, confined space rescue & hazmat services.

7.0

Municipal Modernization Case Studies

7.1

Form Follows Function Organization Design

The Township of Malahide has executed a Modernization Review that has delivered positive results on two fronts:

1. Improved service delivery performance that reduces/avoids costs, generates revenues, improves service levels, or mitigates risk. Service delivery improvements have been identified via “deep dives” into targeted service areas where the “As Is” delivery model has been assessed as problematic/ripe for performance improvement adjustments. These deep dives have included alternative service delivery for policing and a restructured fee-for-service model to deliver County winter control and road maintenance services.
2. Organization structure realignment based on the principal of “form follows function”. The new “As Should Be” organization design has dissolved a sub-optimally designed department, created a new Development Services department, and realigned the Facilities business unit within into a consolidated Public Works department. The newly configured Development Services department will evolve to deliver shared DAP services with a neighbour municipality and also take the lead in overseeing a major new development servicing project in the Springfield community that will generate a multi-million dollar net property tax revenue stream for Malahide over ten years.

Malahide has successfully built out a performance improvement roadmap based on the interconnectedness of *organization form following the imperatives of service delivery function*.

7.2

LEAN Process Reengineering

The County of Lennox & Addington and its four local municipalities have collaborated to execute a Modernization Review of the Development Approvals Process (DAP).

The Review has produced “As Is” DAP process maps for each of the core Planning Act applications executed across the four local municipalities. These “As Is” process maps include average/typical processing timeframes for each application category broken down by the standardized process milestones:

- Pre-consultation
- Application Deemed Complete
- Technical Circulation Cycle 1
- Statutory Public Meetings (If applicable)
- Additional Technical Circulation Cycles

- Council Report Production/Council Approval
- Development Agreement Production/Execution (If applicable)
- Post Approvals Condition Clearance & Return of Securities

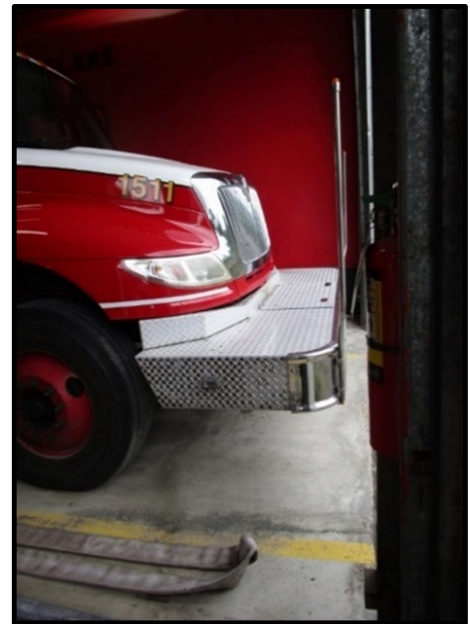
The Review has also identified a series of “As Should Be” LEAN thinking process improvement recommendations. These “As Should Be” process improvement recommendations include a rationalized “who does what” set of roles and responsibilities between the local municipalities and the County. The “As Should Be” recommendations also address process streamlining and standardization to reduce pain points and generate consistent/improved timeframes across the four local municipalities. Finally, the “As Should Be” recommendations address the need for a shared Portal/Workflow IT toolkit to reinforce application process discipline and support KPI accountability reporting.

The performance improvement net result will be a standardized DAP model that eliminates two-tier government process execution friction, achieves improved/measured processing timeframes and utilizes a shared technology to improve accountability and achieve timely DAP decision making that meets County-wide economic development strategic objectives.

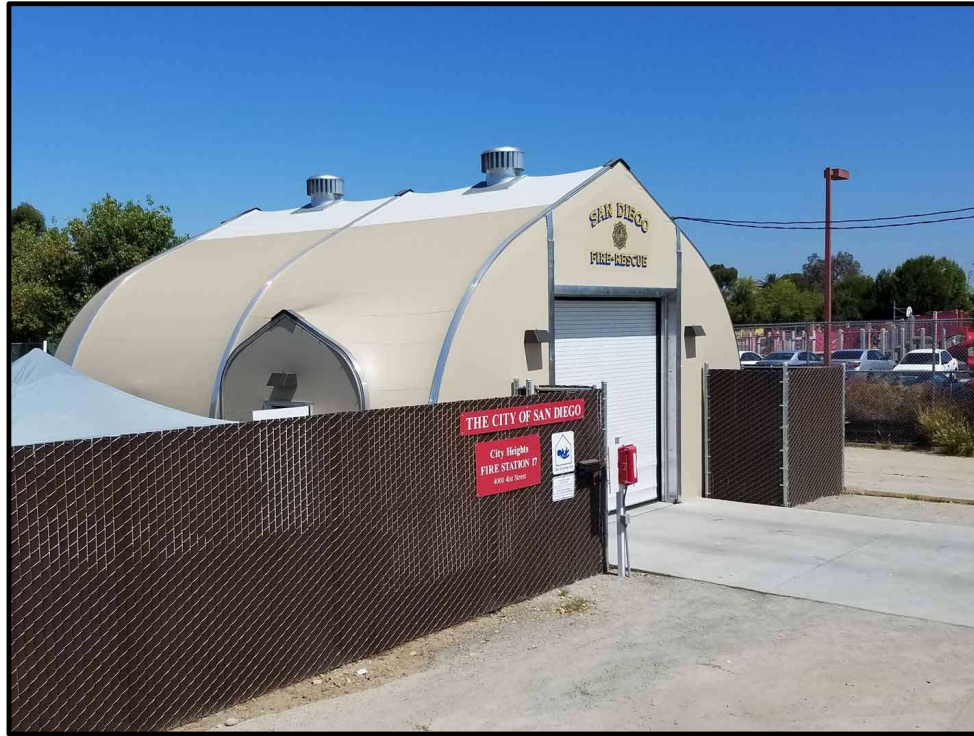
7.3 Rationalized Consolidation of Fire Department Facilities

The municipality of Markstay-Warren (population less than 7,000) is burdened with three pre-amalgamation Fire Halls that are all 40 years+ of age and approaching their asset management end of life. None of the three Fire Halls are operationally appropriate - their dimensions actually constrain the size of Pumper/Tanker the Fire Department deploys. None of the three Halls feature drive-through bays, nor do they meet a range of other functional Fire station industry standards.

O Reg 588/17 requires these Fire Hall assets be positioned for replacement, or an alternative asset configuration be included in the asset management plan required by the end of 2023. The status quo asset management costs for the three Halls are in excess of \$4.5M. The 2020 Markstay-Warren Modernization Review recommended the consolidation of the existing three Halls into a new HQ located in the Markstay community (adjacent to Sudbury growth) and a satellite station located in Warren. A fibre membrane version of the Warren satellite was also considered.



Picture 1 - Fire Hall physical constraints in Markstay-Warren



Picture 2 - A Sample Fabric/Membrane Structure

The recommended consolidated Fire facilities model (HQ + Satellite Bay) preserves resident home insurance discounts in both the Markstay and Warren communities. It also secures major capital cost avoidance of approximately \$2M as per the table below.

Capital Cost Avoidance Return on Investment (ROI)

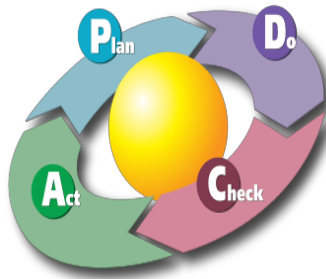
	3 Hall Status Quo	Hall + Satellite Bay Conventional Construction	Hall + Satellite Bay Fibre/Membrane Construction
Asset Management Capital Replacement Cost	\$4,580,750	\$0	\$0
New Capital Cost \$	\$0	\$2,656,575	\$2,454,075
Cost Avoidance Efficiency \$	\$0	\$1,924,175	\$2,126,675

Table 1 - Arena Consolidation Cost Avoidance

8.0

Towards Results Based Management

All of the Performance Concepts team's Municipal Modernization Reviews feature Service Inventories and a portfolio of KPIs. These tools reflect the operational reality that *municipalities are best understood as service delivery systems created to achieve measurable results.*



Key to Results Based Management: Understanding Municipalities as Service Delivery Systems (Service Logic Model)

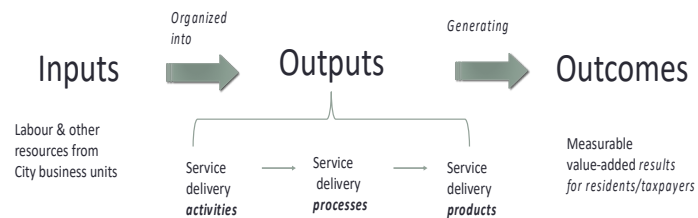


Figure 8 - Results-Based Management

Municipal Key Performance Indicators (KPIs) need to answer 3 fundamental “good management” questions about each forward-facing public service:

- How many countable units of service are being planned/delivered?
- What is the cost/price of each countable unit of service (efficiency)?
- What level of quality/effectiveness is being achieved (client impact)?

If a municipality can answer these questions using KPIs, then the traditional budget process can be transformed into a powerful “results contract”. In the contract, Council agrees to budget \$X on a given service and the staff team commits to deliver Y units of that service at cost/price of \$Z. This budget contract can be expanded over time to include a targeted level of quality/effectiveness.

A Results Based Management toolkit/culture that answers these 3 good management questions and creates a budget contract is at the vanguard of modernizing municipalities in Ontario.

8.1 Brock Services Inventory

In collaboration with Township staff, Performance Concepts has designed an inventory of Brock's forward-facing public services and internal support functions.

Performance Concepts has categorized the *Brock Services Inventory* as follows:

INTERNAL SUPPORT FUNCTIONS

- These activities/processes/functions are provided by Brock's corporate business units (Clerks/Finance) to Brock business units that deliver forward facing services (e.g. Human Resources, Payroll, Training, etc.)

FORWARD-FACING SERVICES with a USER SPECIFIC BENEFIT

- These services benefit individual residents or specifically defined groups of users (e.g. Building Permits, Recreation Programming)

FORWARD-FACING SERVICES with a PUBLIC or GENERAL BENEFIT

- These services benefit the broader public at large (e.g. Winter Road maintenance, Park maintenance, Fire and Emergency Services)

The Performance Concepts categorized *Services Inventory* has been reviewed/validated by the Brock Senior Management team.

8.1.1 CAO Support Functions/Services Inventory

CAO		
SERVICE CLUSTER AND ORIENTATION		
INTERNAL SUPPORT FUNCTIONS	FORWARD FACING: USER SPECIFIC	FORWARD FACING: PUBLIC/GENERAL BENEFIT
Corporate Policy <ul style="list-style-type: none"> •Advisor to Council/Liaison w Staff •Ensures Service Delivery standards •Provides Budget Direction •Program Development 		
Government Relations		
Human Resources		

Figure 9 - CAO Services Inventory

8.1.2

Clerks Support Functions/Services Inventory

Clerk		
SERVICE CLUSTER AND ORIENTATION		
INTERNAL SUPPORT FUNCTIONS	FORWARD FACING: USER SPECIFIC	FORWARD FACING: PUBLIC/GENERAL BENEFIT
IT Services - Durham Region	Public Inquiries <ul style="list-style-type: none"> •Commissions •Marriage Certificates •Death Certificates •Freedom of Information 	Public Inquiries <ul style="list-style-type: none"> •Commissions •Marriage Certificates •Death Certificates •Freedom of Information
Legal Services - Durham Region		
Health and Safety Committee		
Personnel Hiring		
Corporate Communications	Bylaw <ul style="list-style-type: none"> •Complaints •Parking •Property Standards •Licences & Permits 	Bylaw <ul style="list-style-type: none"> •Enforcement
•Newspaper Ads		Crossing Guards
Accessibility		Accessibility
Governance and Council	Statutory Duties: (eg DAP) <ul style="list-style-type: none"> •Planning Act •Municipal Act •Drainage Act 	Corporate Communications <ul style="list-style-type: none"> •Website •Social Media •Newsletters •Media Releases •Correspondence with Media
<ul style="list-style-type: none"> •Secretarial support to council •Agenda/Minutes •Advisory/Citizen Committees 		

Figure 10 - Clerk Services Inventory

8.1.3

Finance Support Functions/Services Inventory

Finance		
SERVICE CLUSTER AND ORIENTATION		
INTERNAL SUPPORT FUNCTIONS	FORWARD FACING: USER SPECIFIC	FORWARD FACING: PUBLIC/GENERAL BENEFIT
Budget <ul style="list-style-type: none"> •Preparation & Reporting •Operating Budget •Capital Budget 		Tax <ul style="list-style-type: none"> •Billing •Collections
Accounting duties <ul style="list-style-type: none"> •General Accounting & Reporting •Accounts Payable •Accounts Receivable 		
Corporate duties <ul style="list-style-type: none"> •Investing and borrowing of funds •Bids and Tenders 		
Asset Management		
Human Resource duties <ul style="list-style-type: none"> •Payroll •WSIB Claims 		

Figure 11 - Finance Services Inventory

8.1.4

Planning & Building Services Inventory

Building Department		
SERVICE CLUSTER AND ORIENTATION		
INTERNAL SUPPORT FUNCTIONS	FORWARD FACING: USER SPECIFIC	FORWARD FACING: PUBLIC/GENERAL BENEFIT
	Building: <ul style="list-style-type: none"> •Building Permits •Inspections (Code + Occupancy) •Site Alteration Permits •Property Standards/Buildings only •GIS Building/Planning •911 Addressing •Septic Inspection Program 	
	Development Approval Process: <ul style="list-style-type: none"> •Zoning Applications •Site Plan Applications •Official Plan/OPAs 	
	Committee of Adjustment: <ul style="list-style-type: none"> •Severances •Minor Variances 	

Figure 12 - Building Services Inventory

8.1.5

Fire & Emergency Services Inventory

Fire Department		
SERVICE CLUSTER AND ORIENTATION		
INTERNAL SUPPORT FUNCTIONS	FORWARD FACING: USER SPECIFIC	FORWARD FACING: PUBLIC/GENERAL BENEFIT
Fire Services: <ul style="list-style-type: none"> •Training (First Aid Included) 		Fire Services: <ul style="list-style-type: none"> •Suppression •Public Fire Prevention Education •Public Fire Prevention–Inspections
	Permits: <ul style="list-style-type: none"> •Burn Permits •Fireworks Permits 	
Emergency Planning: <ul style="list-style-type: none"> •Township Emergency Planning •Tanker Shuttle Accreditation 		Mutual Aid Calls
		Medical Tiered Response
Apparatus/Equipment Management: <ul style="list-style-type: none"> •Administration Fleet •Emergency Response Apparatus •Firefighting Equipment 		Rescue <ul style="list-style-type: none"> •Ice Water Motor Vehicle Collisions •Marine Water

Figure 13 – Fire & Emergency Services Inventory

8.1.6

Public Works

Public Works		
SERVICE CLUSTER AND ORIENTATION		
INTERNAL SUPPORT FUNCTIONS	FORWARD FACING: USER SPECIFIC	FORWARD FACING: PUBLIC/GENERAL BENEFIT
Maintenance (Capital Assets): •Fleet	Maintenance (Recreation): •Arenas (3 pads) •Sports fields and courts	Maintenance (Recreation): •Park Maintenance •Splash pad •Skateboard parks •Playgrounds •Picnic Areas •Beaches •Waterfronts & Harbours
Health and Safety Coordinator	Recreation Programs: •Day Camps •Fitness Programs •Skating Programs •Hall Rentals •Recreation & Leisure Guide •Sports Hall of Fame	
Bids & Tenders		Maintenance (Capital Assets): •Facilities (non recreation) •Roads •Sidewalks •Streetlights •Traffic Control
		Winter Maintenance: •Roads •Sidewalks
		Capital Projects: •Road Construction •Sidewalk Construction
		Cemetery Maintenance

Figure 14 - Public Works Services Inventory

8.2 Key Performance Indicators (KPIs)

Key Performance Indicators (KPIs) will support Brock in its transition towards *Results Based Management*. KPIs will significantly improve Brock's operational planning, budgeting, and results-based accountability reporting. The primary lens for measuring/tracking service delivery performance should focus on "Brock vs Brock" over time. This practical/achievable measurement lens will yield superior value for Brock compared to ill-advised and effort-intensive attempts to compare Brock (at a given point in time) to "unlike" municipalities.

The phrase "you can't manage what you can't measure" is often attributed to W. Edwards Deming; the statistician and quality-control expert credited with having launched the Total Quality Management (TQM) movement. At other times the quote is attributed to Peter Drucker; perhaps the world's most highly regarded management consultant. Performance Concepts is deeply committed to developing "best practice" performance measurement toolkits for our municipal clients. Key performance Indicators are essential when municipalities are trying to objectively allocate scarce resources (e.g. staff capacity and/or taxes) to provide value-added services to residents.

As noted earlier, Key Performance Indicators (KPIs) should answer three fundamental "good government" questions for Brock Council, staff and taxpayers:

1) How many countable units of service (i.e. Outputs) is Brock actually delivering to the public?

This question is answered via *Output* or *Unit of Service* KPIs. These KPIs track standardized countable units of service. Think of them as municipal "Lego" blocks being produced via a municipal government assembly line. Various countable units of service are produced via distinct service activities combined into delivery processes.

2) What do Brock's countable units of service actually cost?

Each countable unit of service is a product that has a cost/price. To be able to track/manage service delivery efficiency, Brock must understand its unit costs/prices for various services. Traditionally, municipalities are much better at understanding organization structure costs (i.e. the factory) than service unit costs (the product). Residents/customers care about products, not factories. Service delivery processes may extend horizontally across multiple departments. Activity-based costing is therefore a must for any municipality that wants to truly understand its service (aka. product) costs.

3) What quality of service is Brock delivering?

Quality/effectiveness KPIs measure the real-world impact of services on the public. Effectiveness/quality measurement in a municipality is varied and diverse:

- Processing through-put times (e.g. a Building permit occupancy decision).
- Response times (e.g. Fire Department average on-scene emergency responses times).
- Predictability/consistency of actual maintenance efforts versus a delivery schedule (e.g. actual timing park grass cutting stops versus 2-week schedule)

Go-forward KPI's should be developed for Brock's inventory of forward-facing services. The portfolio of KPIs must address all three of these "good government" questions in order to set performance targets and transparently report actual results against these targets.

Performance Concepts has developed portfolios of KPIs Brock should consider for each of its inventoried forward-facing services.

8.2.1 POTENTIAL KPIs: Building and Development

Development Approvals Process		
Outputs	Efficiency	Effectiveness
# Planning applications processed # deployed application processing hours # Building permits by Category (Part 3/Part 9) # expended Permit processing/inspection hours	\$ gross cost/application \$ gross cost/processing hour % revenue versus costs \$ Gross cost per Permit/Inspection hour \$ Net cost per Permit/Inspection hour	Average number of controllable business days to process a Planning Application % Building permit files meeting Bill 124 timeframe (Part 3/9) % Inspections executed "on-time" per Bill 124

Figure 15 - Development Approval Process KPIs

8.2.2 POTENTIAL KPIs: By-Law Enforcement

By Law Enforcement		
Outputs	Efficiency	Effectiveness
# of complaints # complaint resolution hours	\$ per complaint \$ per resolution hour \$ parking infraction revenue per parking enforcement hour	# business days to initiate complaint action # business days to resolve complaint

Figure 16 - By-Law Enforcement KPIs

8.2.3

POTENTIAL KPIs: Parks Maintenance and Recreation Programming

Parks Maintenance and Recreation Programming		
Outputs	Efficiency	Effectiveness
# Deployed Parks/Sports Field maintenance hours # Park & Sports Field hectares maintained # Arena pad hours available for rental # deployed Arena maintenance hours	\$ / Parks & Sportsfield maintenance hour \$/ Park & Sports Field hectare maintained Arena pad \$ revenue/operating hour Arena maintenance \$ cost /operating hour \$/maintenance hour \$/ha park space \$/ha sports field	Arena pad utilization rate % cost recovery per Arena pad Sports Field rental utilization rate User satisfaction rating Public satisfaction rating

Figure 17 - Recreation KPIs

8.2.4

POTENTIAL KPIs: Public Works

Public Works		
Outputs	Efficiency	Effectiveness
# Road lane km maintained (MMS category) # Sidewalk metres maintained # deployed maintenance hours by activity category # Bridges/Structures maintained by category # Winter Control staffed machine hours deployed by season (roads + sidewalks) # System-wide winter event responses + # Partial system event responses	\$/Road lane km by category + activity \$/deployed maintenance hour (by activity category) \$/structure maintained \$/Staffed Winter Control machine hour \$/Winter Control pass km (labour + material)	Actual Road maintenance hours expended (by activity) versus planned/required Pavement Condition Index Rating (by Road Section + MMS category) Average # hours to execute post-event road system clean up # Winter Control season overtime + lieu time hours \$ value of winter control overtime hours

Figure 18 - Public Works KPIs

8.2.5 POTENTIAL KPIs: Fire & Emergency Services

Fire & Emergency Services		
Outputs	Efficiency	Effectiveness
# households serviced # properties covered # training hours per ff	\$/household \$/property covered \$ net cost/training hour \$ gross cost/training hour	# Average firefighters per call # Average firefighters per call (M-F daytime) # Average firefighters per call (other times) % of actual vs planned core training hours
# emergency response calls - by category # emergency response call hours (points/paid) - by category	\$/emergency response call \$/emergency response call-hour	Average response time (1st on scene)
# risk-weighted fire inspections executed # risk-weighted fire inspections hours delivered	\$/performed inspection \$/performed inspection hour	# Active emergency response calls per hour of coverage (utilization rate)
# public education events # hours public education	\$/public education event \$/public education hour	# risk-weighted inspections versus scheduled/planned # residents receiving education variance % population receiving education vs % target

Figure 19 - Fire & Emergency Services KPIs

9.0

“As Should Be” Recommendations

The Performance Concepts team has developed “As Should Be” performance improvement recommendations that address service delivery as well as organization design. These recommendations have been organized according to the principal of “form following function”. Changes in organization form must have due regard for service delivery function. Therefore, our team’s service delivery improvement recommendations (Function) have been considered as a necessary “Step 1” before we move on to “Step 2” organization re-design recommendations (Form).

Organization design recommendations have been phased as follows:

- A *Transitional* stage where a partial org re-design takes place, followed by a pause period where Key Performance Indicators are developed, and performance targets are established.
- Once operational targets can be met and the culture has been refocused on measurable results, the business unit in question can then complete its migration to a *Mature* state and its longer-term reporting position. An appropriate Departmental leader will oversee the mature business unit on an ongoing basis at that point in time.

9.1

Fire and Emergency Services

The current organizational structure of the Fire Department is consistent with service delivery provided across three fire stations. Consolidation or re-deployment of the existing fire stations would result in insurance premium impacts for area residents and is not recommended. The Cannington station does have limitations around firefighter parking and other facility issues, and staff are preparing for replacement discussions.

The 2019 Fire Master Plan includes a series of operational recommendations for implementation. Our team’s Modernization Review recommendations are consistent with the Master Plan. The Deputy Chief currently conducts most inspections/investigations. While the Master Plan suggests that the Fire Department is approaching the point of requiring a dedicated Fire Prevention Officer FTE, Performance Concepts recommends that discussions take place about sharing such services between the three North Durham Fire Departments. Similarly, shared training opportunities (e.g. “Training Maze” at Sutherland) should be investigated across North Durham.

Recommendations:

- ***Explore both First Line of Defence (Inspections/Public Education) and Training service sharing opportunities across North Durham (Uxbridge & Scugog), as well as resolving any gaps in Automatic Aid/Mutual Aid agreements.***
- ***Involve Fire Department personnel with Site Plan and Building Department plans examination/inspections for complex buildings to ensure consistent interpretation of Building Code requirements and Fire Code regulations on either side of occupancy.***

9.2 Finance

The Finance Department has seen multiple pressures on staff and resources as a result of both Provincial Regulations (e.g. O. Reg. 588/17 Asset Management) and Council-directed initiatives that require budget impact analysis and costing.

A number of Council-driven financial analyses/projects are being initiated by ad hoc motions of Council and are happening outside the normal budget process. These Council-directed policy changes and initiatives have placed additional burdens on Finance staff to provide ad hoc reports regarding financial implications and budget impacts. These ad hoc reports require a level of analysis that goes beyond the role/capacity of the current staff.

The Treasurer has also been tasked with the leadership role of Asset Management without supporting resources/analytical capabilities. Asset Management is a team sport that requires focused and coordinated attention from multiple Brock departments.

The current organizational structure in Finance reflects overly specialized transaction-based model (e.g. Tax Collector, A/P Clerk, A/R Clerk). This traditional small-municipality model does not serve Brock's go-forward interests. It places an unsustainable burden on the Treasurer/Director of Finance to provide the bulk of the higher value-added reporting and analyses Council requires to make decisions that align with their newly articulated Strategic Priorities.

Recommendations:

Asset Management

Asset Management and the requirements of O. Reg 588/17 are an ongoing risk/priority identified by this Organizational Review. *The following measures are required for a disciplined compliance project.*

- ***The Township should immediately apply for FCM Asset Management grant funding to augment the limited internal capacity required to secure Asset Management compliance with Regulation 588/17.***

- ***An Asset Management Project Team should be formed. Finance will play a meaningful role in executing the asset management project by ensuring financial reporting meets PSAB guidelines and the lifecycle replacement/rehabilitation plan for assets is properly funded.***

Evolution to Analytical/Reporting Support

To fully utilize existing staff resources, the Finance Department will require flexibility between analytical and transaction-based workload. The Treasurer/Director of Finance will need to increasingly rely on staff to be able to undertake a range of analyses and reports. To succeed, Roles/Job Descriptions within the Finance Department staff team will need to evolve from transaction-based specialists to analytical multi-taskers.

Recommendations:

- ***Current job titles and duties should be assessed to determine ideal skillset to manage Brock's transaction-based system as well as analytical assignments***
- ***Upon completion of job assessments, gaps in training or capabilities for existing staff that prevent them from performing additional responsibilities should be undertaken. Segregation of transaction-driven duties can be maintained in order to meet audit requirements, but cross-training is required to mitigate employee absence risk.***
- ***Create "ideal" Job Descriptions with Analytical/Multi-tasker skillsets and capabilities***
- ***Assess current staff's desire for increased responsibilities and implement a training/skills upgrade program as required***

9.3 Public Works

9.3.1 Winter Control

Brock currently delivers winter control services for a road network composed primarily of Minimum Maintenance Standard (MMS) category 4-5 roads. The Provincially mandated post-event response times for these MMS 4-5 roads are as follows:

- Icy road treatment within 12-16 hours
- Post-event snow clean-up within 16-24 hours

Brock deploys a single shift model across the winter season. This model is relatively common among small/mid-sized Ontario municipalities with MMS 4-6 road networks. A winter event that occurs outside of Brock's daytime scheduled shift period (i.e. an evening storm) typically will receive a delayed response by the Township beginning the next morning. This delayed response does not compromise Brock's ability to comply with the above-noted MMS standards. In contrast, the Region of Durham response is more robust and immediate for its MMS 2-3 arterial roads.

However, during a severe winter season with lots of storm events, a single shift winter control model displays certain risks/weaknesses. Staff lieu time and overtime hours can accumulate across a severe winter to significant/problematic levels. Excess staff hours in lieu/overtime costs can carry over into the summer maintenance program. When municipal Public Works staff combine their summer holiday time with accumulated winter control lieu time, the result may be a shortage of available staffed hours to deliver the summer roads maintenance program. Summer maintenance standards may be compromised. Performance Concepts has documented this very problem with a number of Modernization review clients.

Unfortunately, Brock staff are not coding lieu time and overtime by the distinct winter and summer road maintenance service categories. Therefore, it is not possible for Performance Concepts to measure the lieu time/overtime carry-over hours generated across recent winter seasons. As a result we are unable to evaluate the value-for-money performance of Brock’s winter control service delivery model at this time.

Recommendations:

- ***Overtime/In-lieu time as a result of excess Winter Control activity should be documented and monitored to ensure planned non-winter maintenance operations are not negatively impacted***
- ***Winter Control Key Performance Indicators (KPIs) are necessary to monitor the performance of Brock’s single-shift model and manage risks associated with an evolving severe winter season.***

9.3.2 Public Works Maintenance – “Bottom Up” Activity Based Budgeting

Roads, Sidewalks, Parks and Sports Fields are all maintained seasonally by Brock Public Works staff. Proper maintenance of these assets extends their useful life and maximizes public benefit/enjoyment. A series of industry-standard planned maintenance activities are required across each of these asset types. Annual maintenance budgets in “best practice” municipalities are built from the bottom-up. The required # of activity based maintenance hours for each asset object (e.g. a road section) are multiplied by the number of asset objects (e.g. 50 road sections) to arrive at a total labour hours budget for that asset category (Roads).

Ideally a robust maintenance management system is tracking actual activity-based maintenance hours (data collected in the field) against individual asset objects and then rolling these actual hours up across the entire asset category. Actual activity-based maintenance hours can then be tracked against planned/budgeted maintenance hours. A bottom-up budget contract can be created. Activity-based maintenance data can/should inform asset management timing of asset rehab/replacement. As per the following figure a bottom-up activity-based maintenance management system (MMS) is a critical component of a properly implemented asset management system - along with PSAB financial reporting and lifecycle planning software.

ACTIVITY-BASED MAINTENANCE/BUDGETING

O. Reg. 588/17 requirements



Recommendations:

- ***Brock Township needs to create a “bottom up” activity-based planned maintenance budget for Public Works that assigns labour hours/materials to Roads, Sidewalks, Parks and Sports Field in order meet planned maintenance targets and execute an annual “budget results contract”.***
- ***Brock’s MMS will need to support the bottom-up activity-based budget by linking actual expended labour hours/materials to specific asset objects (e.g. road segments by category, facility, etc.)***
- ***The Public Works Co-Ordinator position should become the Asset Management Project Coordinator to secure Reg. 588/17 compliance across the Township***

9.3.3

Facilities Rationalization

Regulation 588/17 mandates rationalized asset management plans for the existing three, aging single-pad arenas by 2023. Replacement cost of the status quo is unaffordable and inconsistent with Council’s strategic directions. Further, declining utilization and increasing expenses strongly suggest the need to consolidate the three single-pad arenas into a single, centrally located twin-pad arena.

This recommendation is not new. The Monteith Brown 2012 Recreation Master Plan recommended a 50,000 sq. ft. twin-pad (85’ X 200’ regulation ice surfaces) at \$250-\$300/sq. ft, or \$12-\$15 million. With inflation factored in, that would be \$326-\$291 in 2020 dollars, or \$16.3-19.6 million.

The Altus Group 2020 Canadian Cost Guide shows Ice Arena construction costs in the GTA at between \$215-\$275/sq. ft., with an additional \$1.4-\$1.8 million per ice sheet for refrigeration plant and rink itself.

Based on these conventional construction costs, a 50,000 sq. ft. twin-pad facility would be estimated at between \$13.75-\$16.75 million vs three 25,000 sq. ft. single-pad facilities at between \$21.5-\$26 million (\$7.2-\$8.7 million each) for a \$7.75-\$9.25 million saving. Of course, cost could be greater or lesser depending on the size of the structure, other features such as an integral community centre, types of finishes, type of refrigeration plant selected, whether refrigeration capacity for a future third rink is incorporated, whether use is winter only or extends into the remainder of the year, etc.



Picture 3 - Collingwood Central Park Arena

120' X 330' structure with 85' X 200' NHL size ice surface

Seating for 390, with Mezzanine Lodge, 6 Dressing Rooms and Referee's Room

R30 insulation

As an attractive alternative, municipalities such as Collingwood, are taking advantage of modern fibre/membrane construction to produce very cost-effective, functional arenas. Generally, a third of the construction cost, with fibre/membrane structure costing approximately \$100/sq. ft., + refrigeration plant and rink cost, a twin-pad is estimated at \$8 million, with three single-pads at \$12.9 million (\$4.3 million each).

Future capital cost avoidance for one twin-pad arena vs three new single-pad arenas, as well as in utilizing modern fibre/membrane construction, is shown in the following chart:

Facilities Consolidation Cost Avoidance

	Three Single-Pad Arena Status Quo	One Twin-Pad Arena Standard Construction	One Twin-Pad Arena Fibre/Membrane Construction
Asset Management Capital Replacement Cost	\$7.2 M – \$8.7 M per pad \$21.6 M – \$26.1 M total	\$0	\$0
New Capital Cost \$	\$0	\$14 M – \$19 M Total	\$8 M Total
Cost Avoidance Efficiency \$	\$0	Up to \$13.1 M potential cost avoidance	Up to \$18.1 M potential cost avoidance

Table 2 - Facilities Consolidation Cost Avoidance



Picture 4 - Example of a multi-pad facility incorporating fibre membrane construction

Recommendations:

- *Replace the current three aged/low-utilization single-pad arenas with an appropriately located twin-pad arena, thereby improving pad utilization and generating significant staffing efficiencies*
- *Location of the twin-pad should have regard for the reality that the existing Sunderland location has historically attracted additional pad rental activity from minor hockey overflow demand from Uxbridge (resulting in better utilization/cost recovery)*
- *Rationalize staff requirements for twin-pad and re-deploy excess staffing capacity to support other Township priorities*

9.3.4

Recreation Programming

The Township requires a complete rationalization of its Recreation Programming with an eye to improve the utilization of other "non-arena" assets, including community centres, beaches, parks and the harbour. With measurable Key Performance Indicators, Brock would have the metrics on current recreation program usage, facility utilization and cost-recovery to make informed decisions on retaining, revising, or eliminating programs.

The requirements of Asset Management under O. Reg. 588/17 will apply to all Township-owned facilities, including community halls. These under-utilized community centres/facilities have ongoing operating expenses with no significant revenues and are going to require capital asset reserve

contributions. They should be used as a platform for recreation programming to justify retention on the Asset list of the Township.

From an organizational design, the Township will have to decide if it wants to continue offering programs or, given the costs involved, whether it should embrace the model where it provides facilities alternative programming service providers.

This decision would be easier to make with a comprehensive Business Plan for Recreation Programming and Facilities. This Business Plan could identify the KPIs Council should use in its decision-making process, establish evidence-based policies for programming changes and facility requirements.

Recommendations:

- *Develop appropriate Key Performance Indicators for ALL recreation programming to inform future service levels and offerings*
- *Create a Recreation Services Business Case to address future service level + utilization and cost recovery policies/targets (This would be an attractive value-for-money alternative to an expensive/formal Recreation Master Plan)*

9.4 Clerks Department

9.4.1 By-Law/Animal Control

The "As Is" evaluation of By-Law Enforcement references a series of sub-optimal deployment challenges (see Section 6.4). The following recommendations address these deployment challenges by separating Brock's Animal Shelter services from higher value-added By-Law Enforcement services.

In addition, the By-Law Enforcement service will benefit from a KPI-supported operational model that tracks staff activity against core by-law functions and actual workload against budgeted/target workload.

Recommendations:

- *Animal shelter operations should be moved to Public Works - Facilities Maintenance via a lower cost staffing model to deliver necessary/appropriate care to animals in custody*
- *By-Law Officers should be focused on higher value-added complaint resolution*
- *By-Law KPIs needed to set targets re: parking infraction revenue, complaint resolution timeframes and unit cost of service*
- *By-Law staff resources should be re-deployed as required to meet KPI-derived performance targets*

9.5 Technology and IT Solutions

A modernized technology toolkit is a key component of implementing meaningful service delivery improvements across Brock. Technology driven productivity improvement can negate/reduce the need for staffing additions in some circumstances. The following technology initiatives should be considered in order to support Brock’s ongoing efforts around continuous improvement.

9.5.1 Asset Management Software

A well-designed asset management toolkit requires integration of the following IT tools

- Accounting software that can properly depreciate and report assets as per PSAB requirements
- Maintenance Management software that can track labour and non-labour planned/reactive maintenance costs against specific asset objects. By doing so the MMS can inform capital budget asset rehab/replacement project timing and priorities
- Asset management software that supports lifecycle analysis and planning. Asset inventory and condition rating data can be used to model various “what if” lifecycle scenarios. The asset management software lifecycle planning scenarios are integrated with financial and MMS data to produce the O. Reg. 588/17 compliant asset management plan.

Recommendation:

- ***Brock needs to evaluate/purchase appropriate asset management software as a critical component of its O. Reg 588/17 compliance project. The Municipal Finance Officers of Ontario “AMP It Up” free consulting program is a valuable source of input for Brock moving forward with asset management project design and execution.***

9.5.2 Citizen Support/Engagement Tools

Customer Relationship Management – Citizen Relationships Around Service Requests and Complaints

There are multiple CRM tools available in the marketplace that can be adapted by municipalities to track/manage citizen “relationships” pertaining to a request for service or resolving a complaint. These tools can be managed on the cloud or on conventional server platform.

A CRM solution would add process discipline and measurable accountability to the citizen/Council and Council/staff interactions around service requests and complaints. Time-tracking metrics around initiating action, completing actions and closing files can be positioned in a citizen relationship dashboard. Citizens would be able to track the workorder progress associated with their request/complaint.

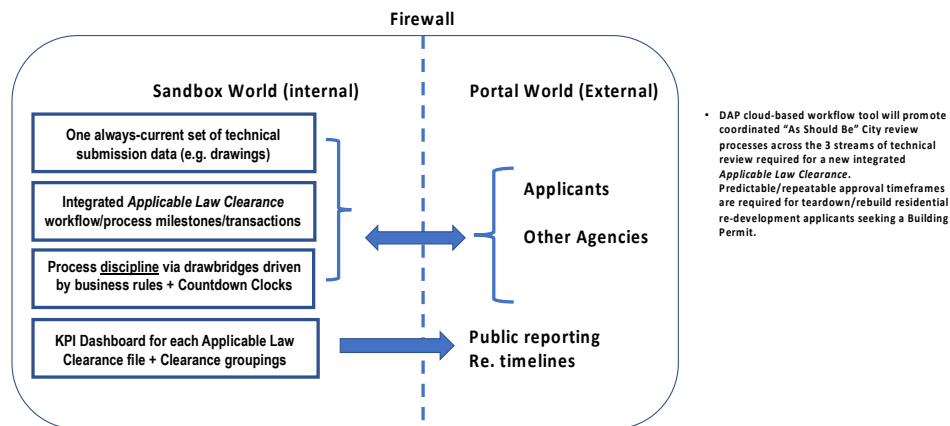
E-Government Portal

Online transactions are a normal feature of consumer life. Municipal governments have been slow to match private sector online commerce channels. Municipalities have a wide range of service delivery options to consider as they embrace E-government. The Development Approvals Process (DAP) is a case in point. Development applications and their supporting submission materials can be submitted online across a firewall protected E-portal. On the municipal side of the E-portal’s firewall municipal various staff can execute their DAP review of centrally located electronic submission files (no paper) in a processing “sandbox”. On the public side of the E- portal’s firewall DAP applicants can track the progress of their applications against appropriate timeframe targets/standards. Performance Concepts municipal modernization clients are actively engaged in DAP E-portal implementation projects.

The following figure from Burlington’s 2019 modernization review provides a useful function example of E-portal functionality applied to the Development Approvals Process (DAP).

3 – “As Should Be” Future State

Cloud Based Workflow Tool: Coordinated Execution of Applicable Law Clearances



2019 Service Delivery Reviews - City of Burlington (Draft)



Figure 20 - Example of Cloud Based Workflow Tool Process

Improved Integration of AVL/Maintenance Management Systems (MMS)

Performance Concepts municipal clients delivering road winter control services are using Automatic Vehicle Location (AVL) technology that tracks pass kilometres across the road system and simultaneous links to material spreaders in order to calculate salt usage spread rates. However, the majority of our client municipalities are not utilizing AVL technology to properly support winter control KPIs.

Recommendation:

AVL should be calibrated/used to achieve the following storm management/reporting outputs by linking AVL to MMS data sets:

- ***Pass kilometres executed with blade down (i.e. productive work) attributed to each winter control route.***
- ***Material Spread rates attributed to each winter control route and each operator/unit.***
- ***Route completion confirmation reporting + route completion actual timeframes versus target timeframes.***
- ***Online portal tracking of winter event responses by residents using AVL data (Where’s My Snow Plow)***
- ***End of season winter control performance reporting using AVL data and post-event clean-up timeframe data set out in the Province’s Minimum Maintenance Standards.***

9.6 A Culture of Accountability

The Performance Concepts team has focused the Review on the “hard” side of municipal service delivery - service delivery processes, organization re-design, measurement tools, IT productivity. We would note that organizational culture is also a critical ingredient in a successful modernization effort by Brock. A shared culture of accountability between Council and staff will act as a “force multiplier” across all of our modernization recommendations.

9.6.1 The One Employee Model

High performing municipalities feature distinct laneways of influence between Council and staff. There are lots of reasons why the laneways of influence between Brock Council and staff have become tangled over time. Entangled laneways of influence are not unique to Brock - they are a symptom of under-performance across the Ontario municipal community.

This Review offers Brock and opportunity to disentangle Council and staff laneways of influence. The hiring of the new CAO allows Council and staff to “turn the page” and embrace a new way of thinking:

- Council acts as Brock’s Board of Directors by setting policies and measurable results standards. Council occupies the accountability laneway. They trade operational influence/control for results. They are the champions of “what”.

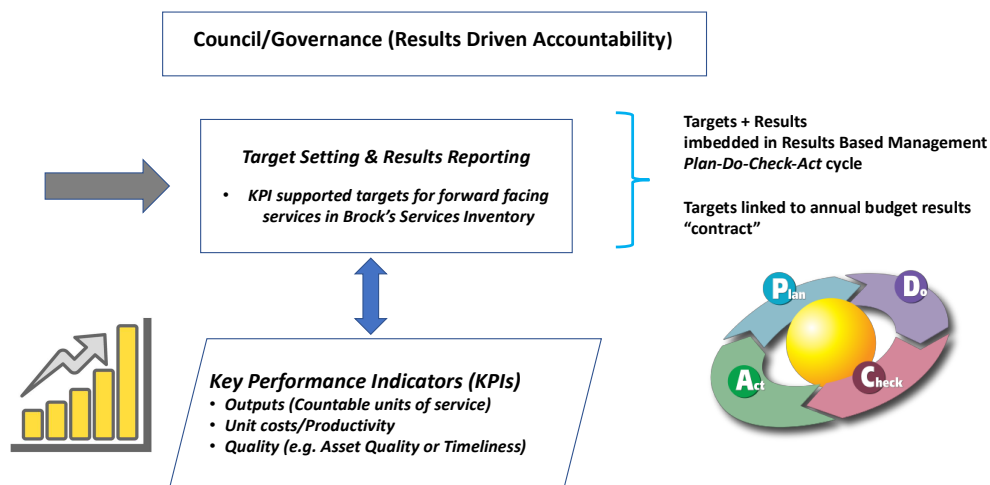
- Staff manages operations and strives to hit the mark when it comes to achieving measurable service delivery results. Staff are the champions of “how” and they are held to account by a Council that is laser-focused on comparing actual results to planned results.

To accomplish this laneway disentanglement, Brock Council and staff must embrace the “One Employee Model” best practice governance model. Council only has one employee and that is the Chief Administrative Officer. The rest of Brock’s staff work for the CAO and should not have to deal with operational interventions by Council members.

Brock’s Organizational By-Law will need to be reviewed and revised to allow Council’s single-employee CAO to fully implement the policy directions of Council.

9.6.2 Key Performance Indicators and Results-Based Business Planning

Brock should make the implementation of Results-Based Management a key priority moving forward. The KPIs set out in this Report are an appropriate starting point. Data sources and tracking systems will need to be evaluated and improved in order to populate Brock’s finalized set of KPIs for its forward facing services in the Services Inventory. Once KPIs are properly supported with dependable data channels, Brock can proceed to develop an annual budget contract and adopt an annual *Plan-Do-Check-Act* results based management cycle.



Recommendation:

- ***A KPI implementation follow-up project is recommended to identify/finalize the appropriate Key Performance Indicators across the Brock Services Inventory. External expert advisory services (funded with 2019 Modernization capital from the Province) will assure timely progress/success with this follow-up project. The project should address operational target setting as well as accountability reporting of service delivery results to Council and the public.***

10.0 Implementation Road Map

10.1 Relentless Focus on Execution

Initiating significant change to achieve improved organizational performance is always hard. It requires a relentless focus on the execution of a well-designed Implementation Roadmap.

The Performance Concepts team has created a carefully phased roadmap; balancing a quick/timely pace of change with a recognition that capacity limitations need to be realized/respected.

The Roadmap is phased across the following three time periods: Do Now (2020-21), Do Soon (2022) and Do Later (2023 & Beyond).

Flexibility has been built into the Do Now/Do Soon timing of “shovel ready” facility consolidation capital projects to take advantage of the just announced \$250 Million Federal/Provincial COVID-19 Resilience Infrastructure Stream municipal program.

10.2 Implementation Roadmap

10.2.1 Fire and Emergency Services

Recommendation	DO NOW	DO SOON	DO LATER
<i>Shared Service Opportunities</i>			
Explore First Line of Defence service sharing opportunities and formalize Mutual Aid Agreements with neighbouring North Durham Municipalities	✓		
<i>Inspection Coordination</i>			
Establish protocol for Fire to work with Building to ensure common Building Code/Fire Code interpretations	✓		

10.2.2 Implementation Roadmap – Corporate/Finance

Recommendation	DO NOW	DO SOON	DO LATER
Asset Management			
Apply for FCM Asset Management grant	✓		
Form Asset Management Project Team	✓		
Evolution from Transaction-based to Generalist			
Undertake Job Assessments	✓		
Evaluate current staff skill sets/Identify gaps	✓		
Create “ideal” job descriptions/levels	✓		
Implement job training/upgrades		✓	

10.2.3 Implementation Roadmap – Public Works

Recommendation	DO NOW	DO SOON	DO LATER
Winter Control			
Document Overtime/In-Lieu re Winter Control	✓		
Develop Winter Control KPIs	✓		
Maintenance			
Create “bottom-up” activity-based budget	✓		
Integrate MMS with activity-based operations		✓	
Assign Town-wide Project Manager for Asset Management Project	✓		
Facilities Rationalization			
Arena Replacement Business Case to move from three separate pads to a single double-pad facility	✓		
Site selection process for new arena site	✓		
Perform financing/costing Due Diligence	✓		
Rationalize appropriate staffing requirements and current staff capacity		✓	✓
Develop “Shovel Ready” Project	✓		
Construction of double-pad arena + decommission of existing single-pad arenas			✓
Recreation Programming			
Develop a Business Case for Recreation	✓		
Develop KPIs to rationalize current programming and facility usage	✓		

10.2.4 Implementation Roadmap – Clerks Department

Recommendation	DO NOW	DO SOON	DO LATER
By-Law/Animal Control			
Align Animal Shelter Facility with Public Works	✓		
By-Law Officers focus on complaints/resolutions	✓		
Develop By-Law KPIs to set targets/determine deployment	✓		
Align By-Law with Building		✓	
Rationalized Roles & Responsibilities			
Confidential Recommendation A1	✓		
Confidential Recommendation A2	✓		
Confidential Recommendation A3	✓		

10.2.5 Implementation Roadmap – Technology and IT Solutions

Recommendation	DO NOW	DO SOON	DO LATER
Asset Management Software			
Select software, roll out solution, ongoing usage	✓	✓	
E-Government Portal/CRM			
Select software, roll out solution, ongoing usage	✓	✓	
AVL			
Refine/improve usage of AVL data to manage winter control	✓		

10.2.6 Implementation Roadmap – A Culture of Accountability

Recommendation	DO NOW	DO SOON	DO LATER
One Employee Model			
Council to affirm “One Employee” Model	✓		
Review and revise Organizational By-Law	✓		
Dedicated administrative staff resource to CAO/Council	✓		
Dedicated HR Specialist	✓		
Key Performance Indicators and Results-Based Business Planning			
Initiate follow-up project for KPI roll out	✓		
Use KPIs to implement performance targets and budget contract		✓	

10.3

Third-Party Progress Assessment

Implementation and execution of organizational change is always challenging. It requires focus and perseverance.

Performance Concepts recommends a 3rd party implementation progress assessment in Q4 of 2021. This progress evaluation will compare actual implementation of the Roadmap against the *Do Now* & *Do Soon* recommended timeframes in this Final Report.

Remedial actions will be recommended (if required) to keep/get implementation on-track as Brock transitions from *Do Now* to *Do Soon* across a range of change driven action items.

11.0

Conclusions & Moving Forward with Change

COVID-generated Provincial debt loads plus O Reg 588/17 asset management requirements are generating significant new financial risks for municipalities moving forward. Brock can mitigate these risks by implementing the Recommendations/Implementation Roadmap set out in this Report.

The 2020 Modernization review has identified potentially over \$14M in capital cost avoidance efficiencies that will benefit Brock taxpayers; without imposing negative service levels impacts in the Recreation Program delivery.

The recommended Arena consolidations contained in this Report are consistent with the evolving reality of Brock as a *single* municipality committed to taxpayer value-for-money.

The Performance Concepts team is committed to supporting Brock as Council and staff continue to use this Report to generate ongoing performance improvement across coming years.

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