



Achieving Organizational Excellence:  
Organizational Review Project

**EXECUTIVE SUMMARY**

September 16, 2024



# AGENDA

Context

Project Purpose

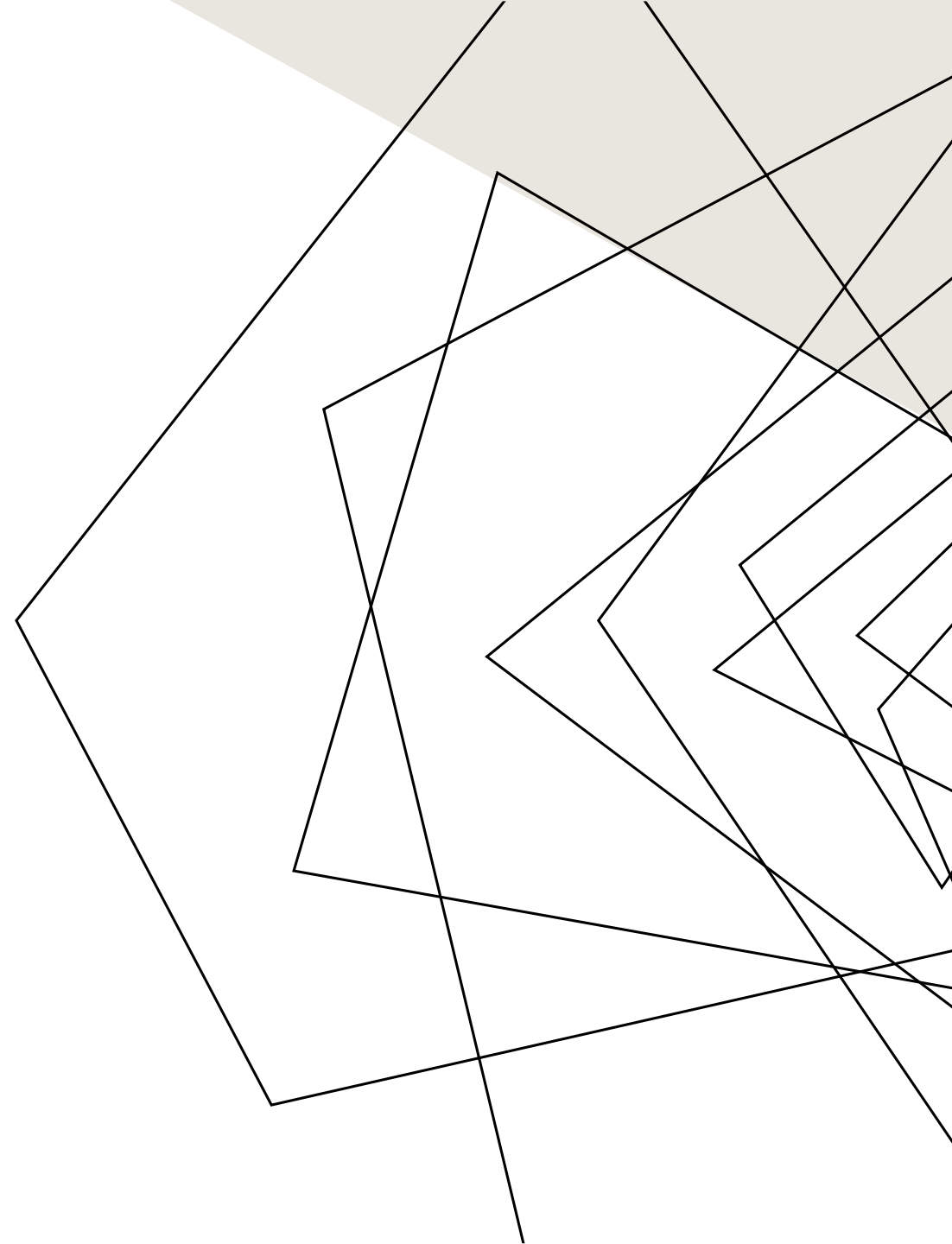
Collaborative Approach

Current Assessment: Case for Change

Recommendations

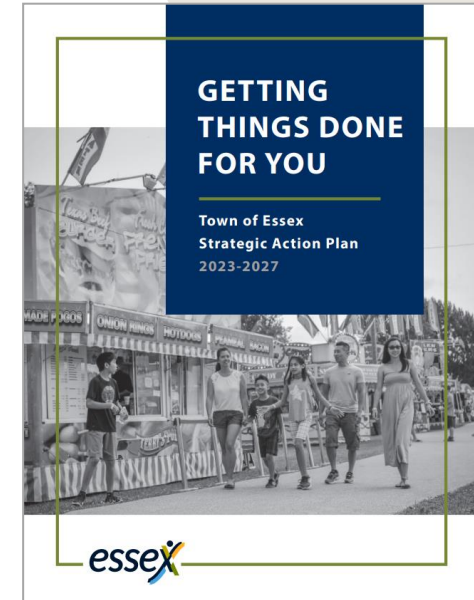
Implementation Plan

Anticipated Benefits



# CONTEXT

Entitled “Getting Things Done for You”, the Town’s 2023-2027 Strategic Action Plan provides Council and staff with a roadmap for action directing budgets, resource allocation and decision-making. This Strategic Action Plan establishes four main goals.



Safe and Reliable  
Infrastructure



Jobs and Economic  
Opportunities



Welcoming and  
Caring Community



Responsible and People-  
Focused Government

# PROJECT PURPOSE

Achieving strategic priorities requires organizational excellence and administrative capacity.

The purpose of this project is to assess whether the Town of Essex has the resources, skillsets, capacity, positive working environment and organizational configuration required to achieve these strategic priorities.

And develop an Implementation Plan to roll out recommended changes.

# COLLABORATIVE APPROACH

Project launch with the CAO/CLT

Input session with Town Council

One-on-one interviews with the CLT

Functional group sessions (14)

Staff Questionnaire

Staff “office hours” for 1:1 conversations

Ongoing working sessions with the CAO and CLT

# CURRENT ASSESSMENT: CASE FOR CHANGE

- 1. Leadership & Decision-Making** – Positive comments from Council and staff about the performance of the CAO and CLT in providing leadership and managing the corporation.
- 2. Customer Service & External Communication** – There has been a significant improvement in external communication over the past few years, however there is a need to build internal capacity and skills to enhance customer service across the organization.
- 3. Teamwork & Collaboration** – Internal communication from the CAO/CLT has improved over the past few years, however there is a need to break down functional silos within departments and across the organization.

# CURRENT ASSESSMENT: CASE FOR CHANGE

## 4. **Roles, Responsibilities & Workload** –

The 2017 organizational review resulted in significant restructuring. Feedback received from Council, management and staff indicate that the current 5-department organizational alignment continues to work well. Workload is an issue in some business units, and there is a need to reconfigure several divisions to clarify roles/ responsibilities; improve efficiency; and rebalance staff workloads.

5. **Process, Practices and Systems** – A few process/functional gaps have been identified, and there is a need to enhance the “report a problem” system/process.

6. **Succession Planning & Staff Morale** – Organizational morale has improved significantly since 2017. However, these gains are at risk because the directors’ heavy workload in managing day-to-day operations reduces their capacity to focus on advancing strategic priorities and effectively mentor their staff. There are also several pending retirements requiring a succession plan.

# RECOMMENDATIONS

No change has been recommended to the five-department structure that was established in 2017. (revised business units shaded below)

<b>CAO</b>				
Human Resources				
Communications & customer experience				
<b>Community Services</b>	<b>Corporate Services</b>	<b>Development Services</b>	<b>Infrastructure Services</b>	<b>Legislative &amp; Legal Services</b>
Recreation & Culture	Revenue & Front Desk Service	Planning	Operations & Drainage	Legal, Licensing & Enforcement
Parks & Projects	Financial Services & Budgets	Building Services	Capital Projects	Legislative Services
Facilities & Events	Information Technology	Strategic Economic Development	Environmental Services	
Fire Services				



# RECOMMENDATIONS / OFFICE OF THE CAO

## **Recommendation 1**

Create “Customer Experience Working Group” as a cross-departmental community of practice chaired by the Manager, Strategic Communications. The purpose of this group is to improve the customer experience across all facilities and programs/services.

## **Rationale**

Address inconsistent levels of customer service across the organization has been identified by staff and Members of Council as an issue.

## **Implementation**

Phase 1

# RECOMMENDATIONS / COMMUNITY SERVICES

## **Recommendation 2**

Establish two business units within Parks & Facilities, each led by an assistant manager position. Assistant Manager, Parks & Projects with responsibility to manage outdoor operations and minor capital projects, and the Assistant Manager, Facilities & Events with responsibility to manage indoor operations and event coordination/oversight.

## **Rationale**

Current split between North and South operations has resulted in some inefficiencies and role duplication.

Recommended new Assistant Manager, Facilities & Events position would help reduce the overtime hours of the Director, Community Services and Manager, Parks & Facilities by sharing community event duties.

## **Implementation**

Phase 1

# RECOMMENDATIONS / COMMUNITY SERVICES

## **Recommendation 3**

Shift responsibility to manage complex major capital projects from Community Services to Infrastructure Services' Capital Projects business unit.

## **Rationale**

Currently, managing internal capital projects consumes significant time/effort for Director, Community Services, Manager, Parks & Facilities, and Assistant Manager, Parks & Facilities.

Project management skillset/experience resides in Infrastructure Services; Capital Projects business unit.

## **Implementation**

Phase 2

# RECOMMENDATIONS / COMMUNITY SERVICES

## **Recommendation 4**

Add capacity in Fire Services in alignment to the Fire Master Plan by making the Fire Clerk a full-time position; assess potential staff capacity issue in Recreation & Culture's program coordination function.

## **Rationale**

This recommendation is consistent with the First Services Master Plan.

An internal assessment is required to ensure staff daily activities are consistent with job description roles and responsibilities.

## **Implementation**

Phase 2

# RECOMMENDATIONS / CORPORATE SERVICES

## **Recommendation 5**

Establish two business units by upgrading the Assistant Manager, Finance to become Manager, Revenue & Front Desk Services and revising the Manager, Finance & Business Services to become Manager, Financial Services & Budgets; revise Assistant Manager, Business Services title to Assistant Manager, Procurement & Contracts.

## **Rationale**

Addresses the current lack of role clarity by establishing two business units with distinct areas of focus – one on revenue analysis and day-to-day transactional operations/customer service and the other on long-term planning, budgets and asset management oversight.

## **Implementation**

Phase 1

# RECOMMENDATIONS / CORPORATE SERVICES

## **Recommendation 6**

Merge all Town Hall customer service/reception/bill payment functions together under the Manager, Revenue & Front Desk Services.

## **Rationale**

Address current customer service issues by establishing a single team focused on providing a one-window approach to customer service.

Eliminates the silos that currently exist among staff in this department.

## **Implementation**

Phase 1

# RECOMMENDATIONS / CORPORATE SERVICES

## **Recommendation 7**

Centralize the coordination and oversight of asset management within Corporate Services; create a new Assistant Manager, Financial Analysis & Planning with responsibility to support budgeting and long-term planning; coordinate/oversee asset management; and track/coordinate the grant application/reporting process.

## **Rationale**

Contributes to addressing an urgent and time-sensitive need to comply to Provincial requirements and timelines.

Merging asset management with financial planning and budgeting functions strengthens the organization's ability for long-term financial planning.

## **Implementation**

Phase 1

# RECOMMENDATIONS / CORPORATE SERVICES

## **Recommendation 8**

Create a new IT Systems Analyst position reporting to the Manager, IT with responsibility to oversee the Town's technology systems.

## **Rationale**

With two FT resources, IT is under-staffed in comparison to similarly sized municipalities. This recommendation will contribute to addressing current workload issues and assist this business unit in meeting departmental needs.

Contribute to providing capacity to implement the recommendations of the recently completed IT Strategy.

## **Implementation**

Phase 2



# RECOMMENDATIONS / DEVELOPMENT SERVICES

## **Recommendation 9**

Shift bylaw enforcement function from Development Services to Legislative & Legal Services' Legal, Licensing & Enforcement Services business unit; transition full-time and part-time bylaw enforcement officers to report to the Manager, Legal, Licensing & Enforcement.

## **Rationale**

Increased community and political demand for bylaw and property standards enforcement coupled with current growth rates require shifting enforcement activities to Legislative and Legal Services.

This configuration is consistent with trends in municipal government.

## **Implementation**

Phase 2

# RECOMMENDATIONS / DEVELOPMENT SERVICES

## **Recommendation 10**

Expand the Manager, Economic Development position to include strategic initiatives; create a new Analyst, Economic Development & Business Relations contract position to report to this Manager.

## **Rationale**

Strategic initiatives, potential alternative revenue generation opportunities, corporate sponsorship, and business relations were identified as gaps. This recommendation will contribute to addressing all these gaps.

Analyst, Economic Development & Business Relations contract position (Yr 1) and Grant Match Software covered by a provincial grant.

## **Implementation**

Phase 1

# RECOMMENDATIONS / INFRASTRUCTURE SERVICES

## **Recommendation 11**

Refocus the Capital Works & Asset Management business unit on managing capital projects and supporting asset management activities; revise job descriptions of Manager and Assistant Manager position to reflect this change; upgrade IS Clerk to a full-time position; increase compliment of Public Works Operators to address current staff capacity issues.

## **Rationale**

Address Infrastructure Services performing finance-related tasks that are closely tied to budgeting and financial planning.

Contributes to addressing an urgent and time-sensitive need to comply to Provincial asset management requirements/timelines.

Contributes to refocusing this business unit to manage major capital projects and support capital projects for other departments.

## **Implementation**

Phase 2

# RECOMMENDATIONS / LEGISLATIVE & LEGAL SERVICES

## **Recommendation 12**

Establish two business units: Legal, Licensing & Enforcement and Legislative Services; revise manager positions to reflect role revisions; shift one of the current Customer Service Representatives to become the Legal & Legislative Clerk reporting to the Director.

## **Rationale**

Increased demand for bylaw enforcement. This configuration is consistent with trends in municipal government.

Requiring that the Manager, Legal, Licensing & Enforcement is a lawyer will save approximately 70% of the cost of external solicitor services (about \$55,000 per year).

Liaison/discussions with the Appeals Committee will be more effective.

## **Implementation**

Phase 1 & 2

# IMPLEMENTATIONAL PLAN

- **Phase 1: Foundation Building** (within 6 months) – focusses on making some immediate improvements to address urgent issues/challenges and build positive momentum for change.
- **Phase 2: Capacity Building** (within 3 years) - addresses increased demand from community growth by building internal capacity to deliver.

## Phase 1: Foundation Building

R1, R12, R2, R5, R6, R10

## Phase 2: Capacity Building

R9, R8, R7, R11, R3, R4

Estimated Phase 1 Cost: **\$184,594**

Estimated Phase 2 Cost: **\$530,854**

# COSTS / PHASE 1

<b>Phase 1: Foundation Building</b>	<b>Estimated Cost</b>
R1: Customer Experience Working Group	\$0
R12: Legislative & Legal Services changes	\$60,373
R5: Corporate Services changes	\$0
R6: Town Hall customer service merger	\$41,331
R10: Economic Development changes	\$0*
R2: Parks & Recreation changes	\$137,889
	\$239,594
(less legal savings)	\$(55,000)
<b>TOTAL ESTIMATED COSTS</b>	<b>\$184,594</b>

# COSTS / PHASE 2

<b>Phase 2: Capacity Building</b>	<b>Estimated Cost</b>
R9: Bylaw enforcement shift to Legislative & Legal Services	\$0
R8: IT Systems Analyst position	\$105,451
R7: Asset management shift to Corporate Services	\$136,689
R11: Refocus Capital Works & Asset Management & FT Infrastructure Clerk and FT Public Works Operator	\$35,216 \$101,000
R3: Shift major capital projects to Infrastructure Services	\$0
R10b: FT Analyst Economic Development & Business Retention	\$111,822
R4: Fire Services Administrative Assistant / review Community Services program coordinators	\$40,676
<b>TOTAL ESTIMATED COSTS</b>	<b>\$530,854</b>

# ANTICIPATED BENEFITS

- ✓ More effective clustering of activities and functions will reduce role duplication/overlap; improve operational efficiency; and achieve more positive outcomes.
- ✓ Improve customer service expectations and standards by establishing a cross-departmental customer service “community of practice”.
- ✓ Addresses a significant capacity/workload issue in Community Services’ Parks & Facilities division.
- ✓ Addresses several current functional gaps by strategically increases staff complement; adjusting roles/responsivities; and clustering functions more effectively.
- ✓ Demonstrate that people are valued by implementing recommendations to address current workload issues and provide interesting career path options.





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Consulting

**THANK YOU**

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