

Town of Essex

Achieving Organizational Excellence

Final Report

(VERSION 6.0)

September 16, 2024

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1.0 Introduction

- 1.1 Context
- 1.2 Current State Functional Model
- 1.3 Case for Change Summary
- 1.4 Design Principles

Project Context

- ❑ One of seven municipalities within the County of Essex, The Town of Essex has a population of 21,216 and consists of four distinct urban centres - Essex Centre, Colchester, Harrow and McGregor.
- ❑ 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



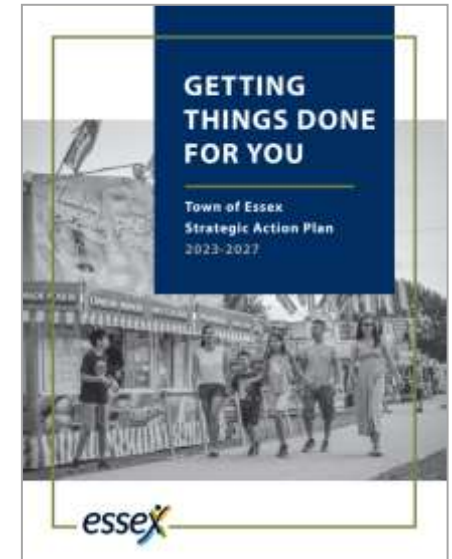
Jobs and Economic
Opportunities



Welcoming and
Caring Community



Responsible and People-
Focused Government



The Purpose of This Project

- ❑ Achieving the above strategic goals 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. In addition, this project also includes the following outcomes:
 - Review the strengths and weaknesses of the current organizational structure and recommend changes to establish a strong foundation for long-term organizational effectiveness, continuous improvement and innovation.
 - Conduct a targeted comparative analysis to identify trends, organizational design features and innovative practices.
 - Explore current staffing levels and incorporate a succession planning perspective.
 - Develop an implementation strategy to roll out recommended changes.

The “Big Picture”

- ❑ The Town of Essex offers residents a full suite of services with a full-time staffing complement of 84 staff supported by various part-time and casual employees. The below Current State Functional Model includes the primary functions by department/business unit. This model was the outcome of the 2017 organizational review.

CAO				
- Human Resources - Communications				
Community Services	Corporate Services	Development Services	Infrastructure Services	Legislative & Legal Services
Recreation & Culture - Programs - Aquatics - Events - Marketing/promotion - Customer service	Finance & Business Services - Budgets and financial planning - Accounting, accounts payable, accounts receivable - Payroll & benefits - Taxation & revenue - Procurement/purchasing, invoicing & agreements - Water billing - Customer service	Planning - Policy planning - Planning and development applications	Operations & Drainage - Public works - Fleet & equipment - Road maintenance - Drainage	Legal & Licensing - Internal legal support - Licensing
Parks & Facilities - Facilities operations & maintenance - Parks, trails, fields and open spaces - Customer service	Information Technology - Systems and applications - Network - Helpdesk & support - Data management & security	Building & Bylaw Enforcement - Building inspections & building code enforcement - Property standards & bylaw enforcement	Capital Works & Asset Management - Asset management planning - Capital projects	Legislative Services - Mandated Clerk role - Council support - Records & bylaw management - Customer service - Crossing guards
Fire Services - Fire suppression - Emergency services - Community engagement and education		Economic Development - Tourism and business investment promotion - Business relations	Environmental Services - Water management - Wastewater management	

Summary of Current State Assessment Findings

- ❑ A highly collaborative approach was used to complete this current assessment phase, including:
 - ❑ Review of existing documents, including the strategic plan, organizational charts, job descriptions, and other relevant reports;
 - ❑ Project launch meeting with the Chief Administrative Officer (CAO) and Corporate Leadership Team (CLT);
 - ❑ Input session with Town Council;
 - ❑ One-on-one interviews with the CLT;
 - ❑ Departmental functional group sessions (14 sessions);
 - ❑ Staff Questionnaire;
 - ❑ Staff “office hours” for 1-on-1 conversations with staff; and
 - ❑ Ongoing discussions with the CAO and CLT.
- ❑ The Current Assessment: Case for Change (see Appendix C for full report) documenting synthesized finding into the following six themes:
 1. **Leadership & Decision-Making** – Overall 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.
 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.

Long-Term Organizational Effectiveness

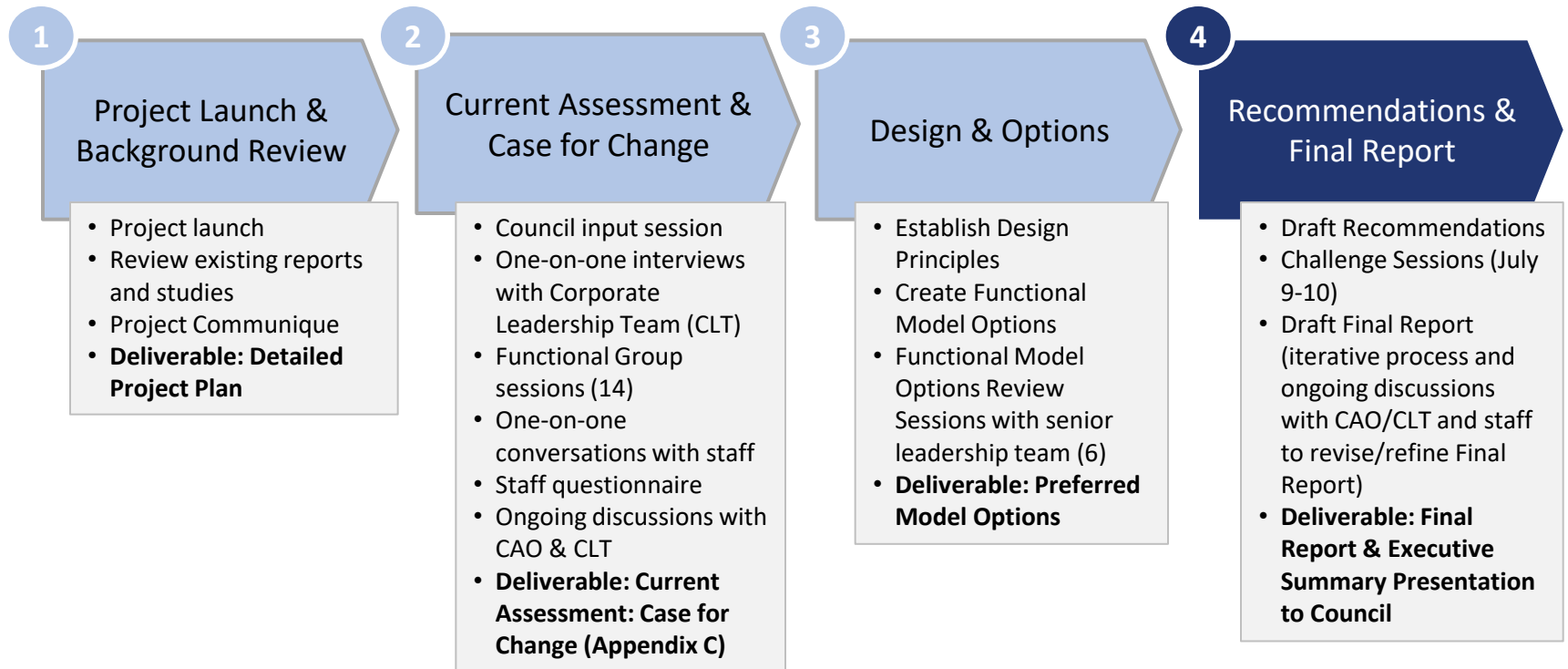
- ❑ In addition to addressing the current operational challenges, it is important that recommended changes are consistent with organizational design best practices to ensure long-term organizational effectiveness. The following Design Principles have been created to help evaluate potential model options and develop recommendations for change:
 1. **Contribute to Achieving Strategic Priorities.** Organizational change must provide a solid foundation to ensure the municipality is positioned to deliver results based on strategic priorities.
 2. **Cluster Functions Based on their Strongest Synergies.** Organizational change must cluster functions based on the strongest synergies contributing to effective and efficient operations.
 3. **Ensure Balanced Span of Authority.** Organizational change must balance the spans of authority across the organization, both from a perspective of number of staff and number of functional areas.
 4. **Contribute to Citizen-Focused Service Delivery.** Organizational change must enhance the capacity of the municipality to provide services in an accessible, responsive and timely manner.
 5. **Demonstrate That People Are Valued.** Organizational change must contribute to employee engagement and provide viable career path opportunities.
 6. **Realistic & Affordable.** Organizational change must be achievable. Conceptual models may look good on paper, but if implementation success is improbable, the changes should not be attempted.

2.0 Recommendations

- 2.1 Introduction
- 2.2 Preferred Functional Model
- 2.3 Recommendations
 - 2.3.1 Office of the CAO
 - 2.3.2 Community Services
 - 2.3.3 Corporate Services
 - 2.3.4 Development Services
 - 2.3.5 Infrastructure Services
 - 2.3.6 Legislative & Legal Services
- 2.4 Staffing Impacts

From Findings to Recommendations

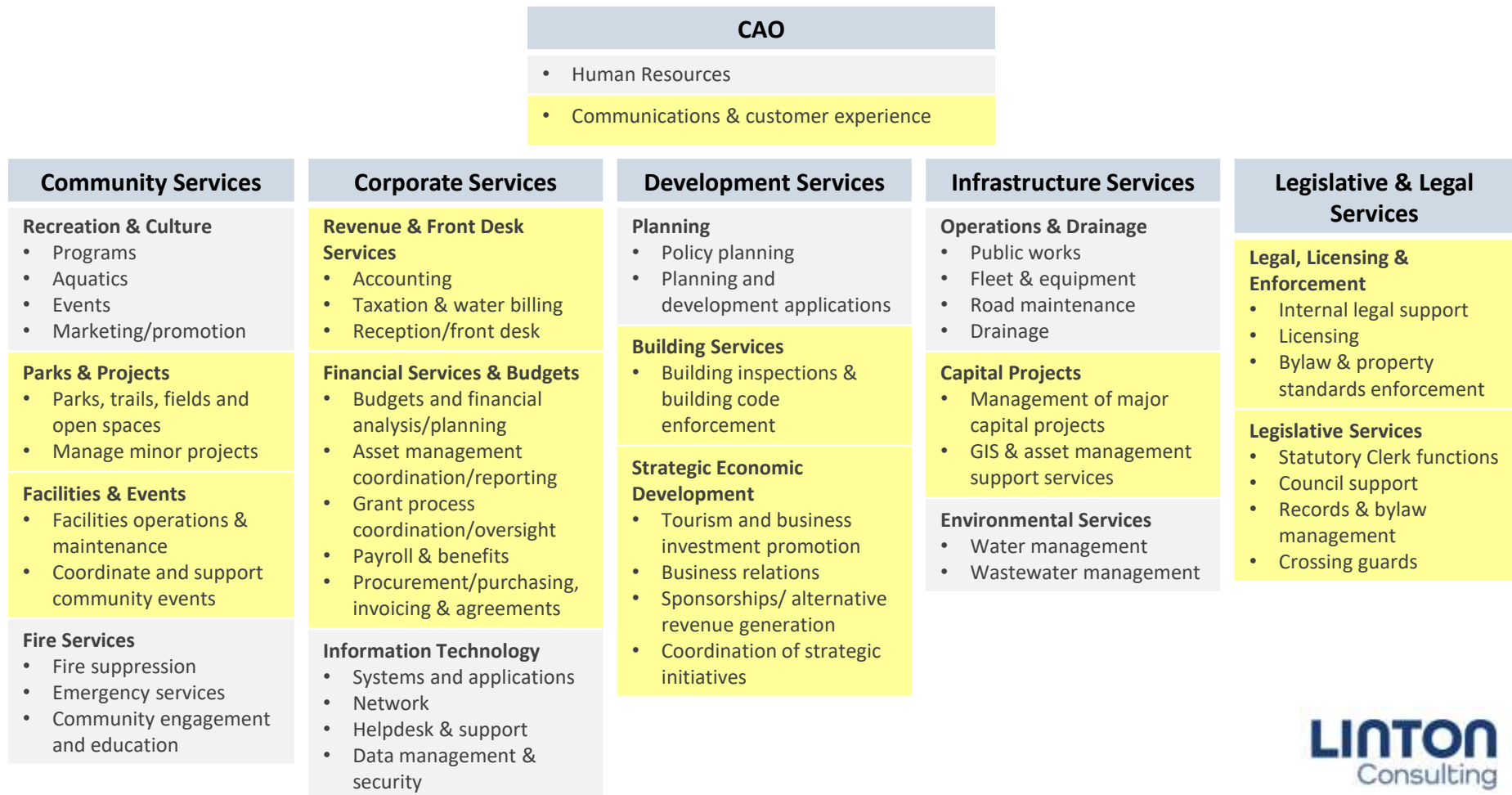
The below process was used to transition from findings to recommendations:



2.2 Future State Functional Model

The “Big Picture”

- ❑ Establishing a high-level Future State Functional Model prior to developing a detailed organizational chart contributes to a solid foundation with departments and business units that clusters similar/dependent functions ensuring accountability for outcomes.
- ❑ No change has been recommended to the five-department structure that was established in 2017. Business units with organizational change/reconfiguration recommendations have been highlighted in yellow:

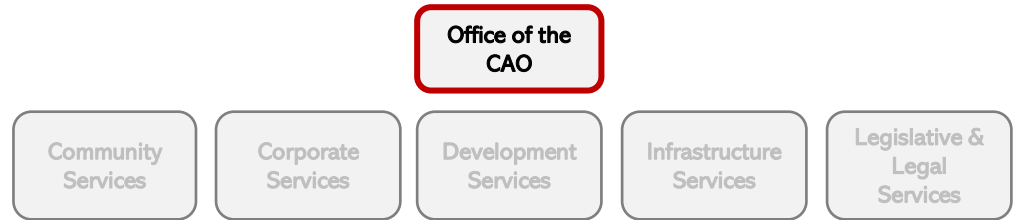


2.3.1 Recommendations - Office of the CAO

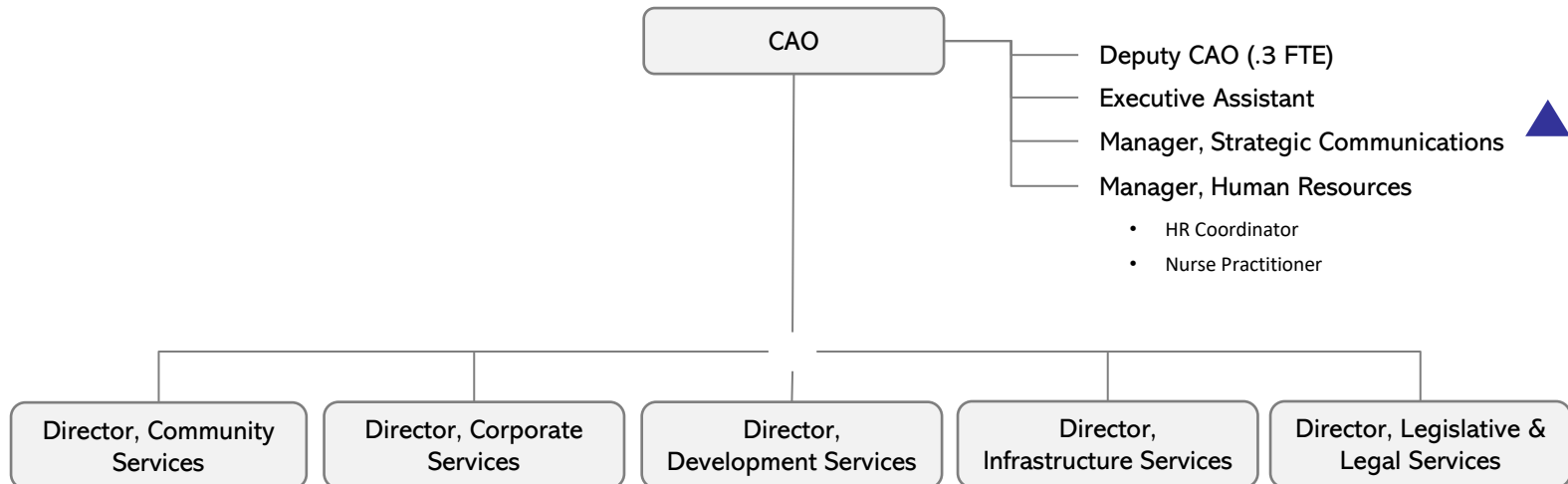
pg. 11

Roles/Responsibilities (change from status quo bolded)

- CLT oversight
- Primary linkage to Mayor/Council
- Human resource management
- Corporate communications
- **Overall customer experience**

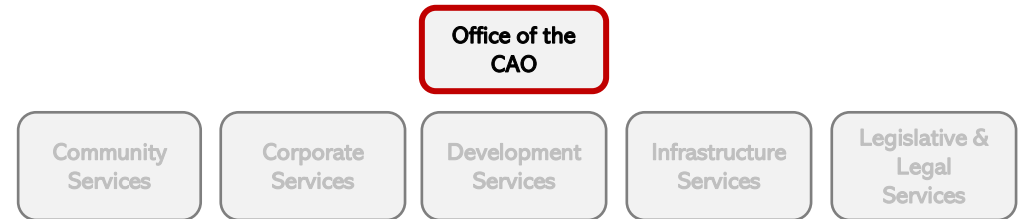


Future State Organizational Chart



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.



Details

- Customer Service Working Group would meet monthly.
- Focus of this group is to discuss and forward directly to CAO/CLT recommendations to improve the customer experience at all facilities and programs/services. These recommendations could include such things as customer service expectations/procedures, processes/practices, training, taking payment requirements, and/or tools/applications.
- The purpose of this group is to move as quickly as possible to towards practical action. To facilitate this, this working group should remain as lean as possible. One manager per department should be considered. Recommended members:
 - Manager, Strategic Communications (Chair)
 - Executive Assistant (minutes/action items)
 - Manager, Recreation & Culture
 - Manager, Revenue & Front Desk Services
 - Manager, Strategic Economic Development
 - Manager, Operations & Drainage
 - Manager, Legislative Services (Deputy Clerk)
 - Manager, Human Resources
 - Manager, IT

Rationale / Anticipated Benefits

- Inconsistent levels of customer service across the organization has been identified by staff and Members of Council as an issue.
- Aligned to the following Design Principles:
 - **DP1 – Contribute achieving strategic priorities** by formalizing accountability for good customer service.
 - **DP2 – Cluster functions based on their strongest synergy** by merging customer service (messages in) with communications (messages out).
 - **DP4 – Contribute to citizen-focused service delivery** by establishing a community of practice dedicated to improving customer service.
 - **DP6 – Realistic & affordable.** Limited cost and limited org change required to implement this recommendation.

Implementation Considerations

- Director must ensure their direct reports have the capacity to participate in these monthly meetings.
- Meetings must be held monthly and result in clear action items and timelines.
- Directors can be invited from time to time to provide subject matter expertise and/or explain CLT direction for any items on the agenda.

Timing: Phase 1 Implementation

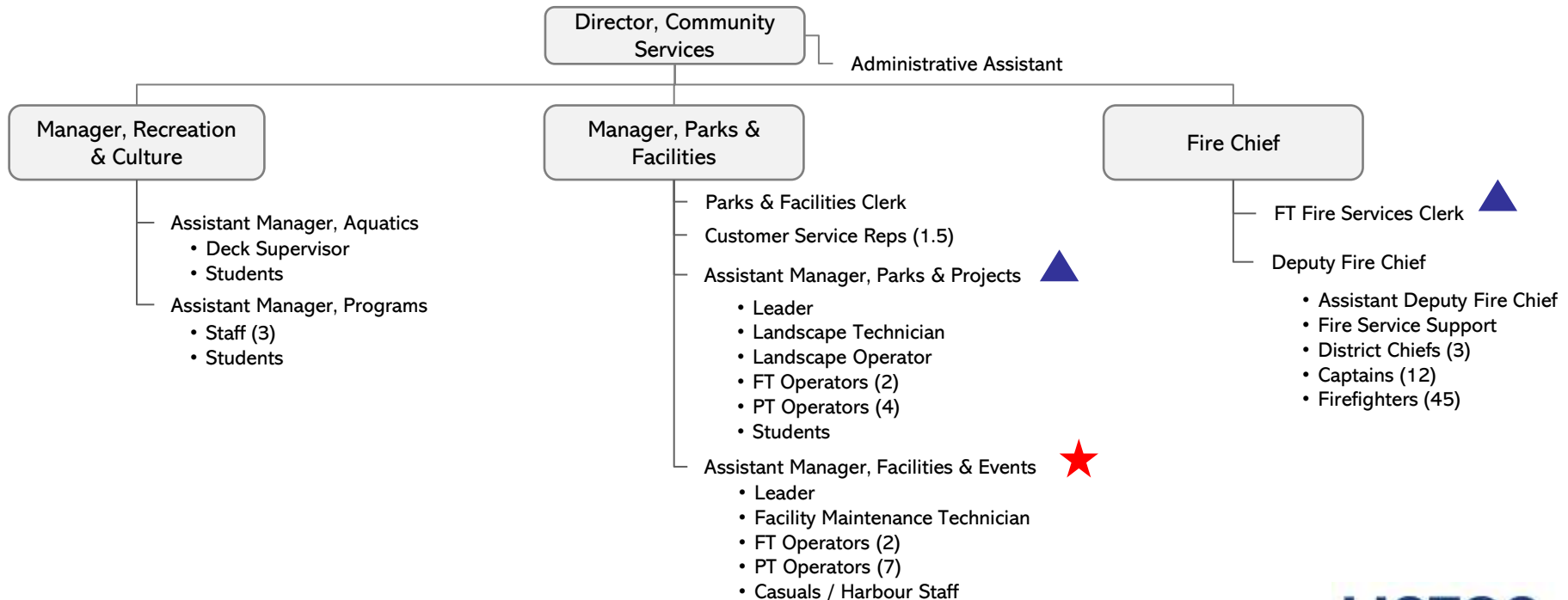
2.3.2 Recommendations – Community Services

Roles/Responsibilities (change from status quo bolded)

- Recreation, culture and leisure programs
- Marketing and promotion
- User group relations/liaison
- Community events
- Facility, parks, trails, sports fields
- **Minor capital projects**

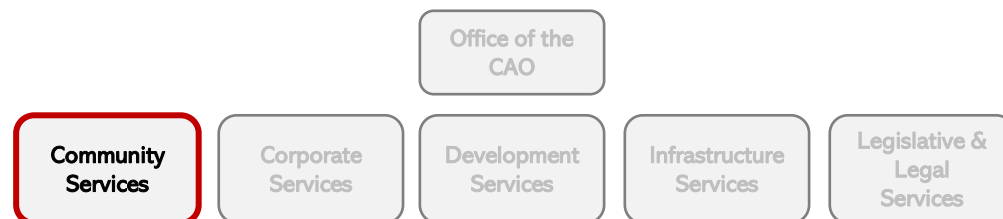


Future State Organizational Chart



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.



Details

- Parks & Facilities Clerk and Customer Service Representatives (1.5) would report directly to the Manager, Parks & Facilities. All other staff would report to one of the assistant managers.
- Assistant Manager, Parks & Projects would be based in the Harrow and Colchester South Community Centre while the Assistant Manager, Facilities and Events would be based in the Essex Centre Sports Complex.
- While full-time and part-time staff would report directly to a single Assistant Manager, their duties will continue to include both indoor and outdoor-related work. Staff will be shifted based on seasonal demand based As determined by the Manager and Assistant Managers.
- The Assistant Manager, Facilities & Events position would be responsible for attending most events (Manager, Parks & Facilities and Assistant Manager, Parks & Projects would be the back-ups). The job description of this new position should reflect a requirement for evening and weekend work to avoid significant overtime hours.

Rationale / Anticipated Benefits

- 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.
- Aligned to the following Design Principles:
 - **DP2 – Cluster functions based on their strongest synergy** by shifting to a functional rather than a North-South model.
 - **DP3 – Ensure balanced span of authority** by reducing the number of direct reports to the Manager position.
 - **DP5 – Demonstrate that people are valued** by addressing workload/work-life balance issues for the Manager and Director positions.

Implementation Considerations

- Important to develop a practical and fair policy/process for sharing FT and PT resources between the two business units.

Timing: Phase 1 Implementation

Recommendation 3

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



Details

- Validate criteria for “major projects” to be transitioned to Infrastructure Services’ Capital Projects business unit. This criteria could include:
 - Dollar value of project
 - Involvement of external parties (e.g. engineers, architects)
 - Complexity of project
- Clarify that all projects that do not meet “major project” criteria are classified as “minor projects” and will continue to be managed/delivered by Community Services.

Rationale / Anticipated Benefits

- 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.
- Aligned to the following Design Principles:
 - **DP2 – Cluster functions based on their strongest synergy** by shifting project management of major projects to the business unit within Infrastructure Services with project management skillset, expertise and tools.

Implementation Considerations

- Community Services must continue to provide subject matter expertise and be involved at every phase of major projects.

Timing: Phase 2 Implementation

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.



Details

- 2024 Fire Services Master Plan Recommendation 3-1 was to consider changing the administrative assistant role from a part-time position to a full-time position. The importance of this role to support both fire and emergency preparedness was well-supported in the Master Plan.
- Assess the current roles and responsibilities of the two part-time program coordinators to ensure appropriate attention/focus is being given to expanding programming options to facilities outside Essex Centre. Based on this internal assessment, determine if additional staff capacity is required.

Rationale / Anticipated Benefits

- 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 Considerations

- n/a

Timing: Phase 2 Implementation

2.3.3 Recommendations – Corporate Services

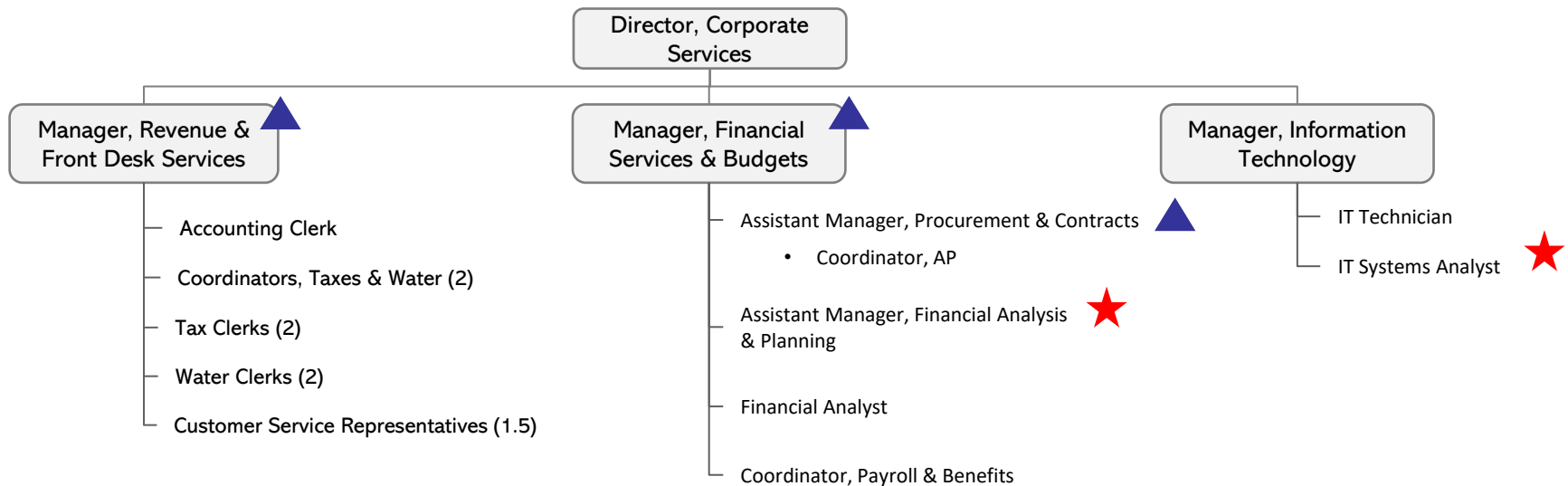
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Roles/Responsibilities (change from status quo bolded)

- Budgets and financial analysis/planning
- **Asset management coordination/oversight**
- Payroll & benefits
- Procurement/purchasing, invoicing & agreements
- Accounting
- Taxation & water billing
- **Customer service/reception**



Future State Organizational Chart

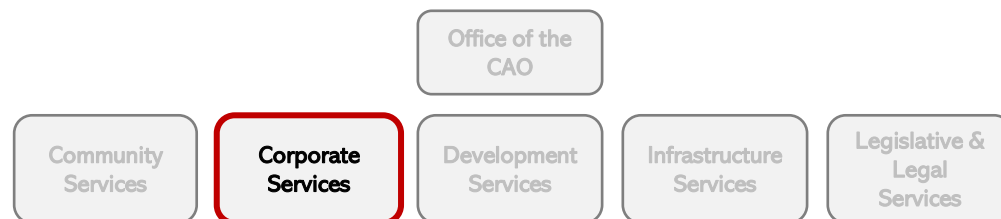


Recommendation 5

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.

Details

- Establish a mandate statement for Revenue & Front Desk Services to be responsible for organization-wide revenue analysis and day-to-day transactions/customer service
- Establish a mandate statement for Financial Services & Budgets to be responsible for long-term financial analysis and planning, budgets, and asset management coordination and oversight.
- Revise position titles and job descriptions of manager positions.
- Revise position title and job description of Assistant Manager, Procurement & Contracts to more accurately reflect actual roles/responsibilities.



Rationale / Anticipated Benefits

- 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.
- Aligned to the following Design Principles:
 - **DP1 – Contribute to achieving strategic priorities** by enhancing capacity for long-term financial analysis and planning.
 - **DP2 – Cluster functions based on their strongest synergy** by pulling organizing similar/dependent functions into separate business units.
 - **DP3 – Ensure balanced span of authority** by supporting the Director with two managers with clear areas of responsibility.
 - **DP4 – Contribute to citizen-focussed service delivery** by eliminating current silos shifting all customer service/reception functions under a single Manager.
 - **DP6 – Realistic & affordable.** This recommendation only requires an upgrade to one position.

Implementation Considerations

- Implementing this recommendation will require significant disentanglement of current activities and roles. Effective change management will be required to shift responsibilities and reporting arrangements.

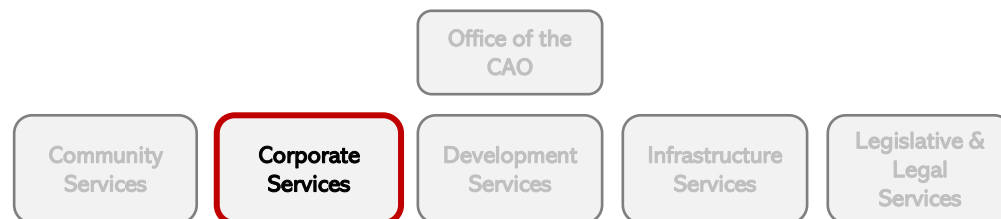
Timing: Phase 1 Implementation

Recommendation 6

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

Details

- Shift Tax Coordinator and Tax Clerks to report to the Manager, Revenue & Front Desk Services.
- Shift one of the two Legislative & Legal Services' Customer Service Representatives to report to the Manager, Revenue & Front Desk Services.
- Shift ½ Customer Service Representative from Parks & Facilities to provide customer service back-up.
- Revise job descriptions as required.
- Shift physical workspaces at Town Hall to accommodate all clerks and customer services representatives in the same location in close proximity to a single customer counter called "Customer Service Counter".
- Provide cross-training to ensure that Water Billing Clerks, Tax Clerks and Customer Service Representative can provide customers with a full-range of services and back each other up as required. It is expected that positions continue to be subject matter experts in their areas of specialty.



Rationale / Anticipated Benefits

- 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.
- Aligned to the following Design Principles:
 - **DP1 – Contribute to achieving strategic priorities** by clarifying who does what related to long-term financial analysis and planning.
 - **DP2 – Cluster functions based on their strongest synergy** by pulling organizing similar/dependent functions into separate business units.
 - **DP3 – Ensure balanced span of authority** by supporting the Director with two managers with clear areas of responsibility.
 - **DP4 – Contribute to citizen-focussed service delivery** by shifting all customer service/reception functions under a single Manager.
 - **DP6 – Realistic & affordable.** This recommendation shifts current resources and only requires an upgrade to one position.

Implementation Considerations

- Effective change management will be required to shift responsibilities and reporting arrangements.

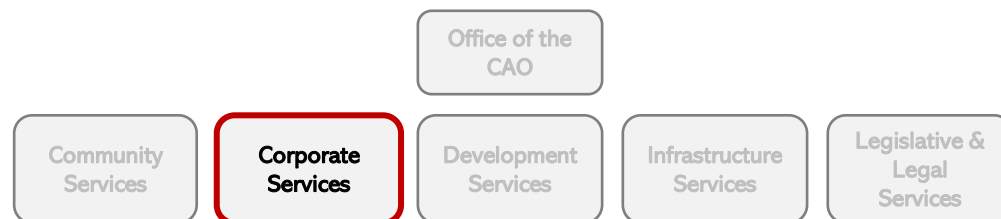
Timing: Phase 1 Implementation

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.

Details

- Establish a job description for the Assistant Manager, Financial Analysis & Planning position; fill this position.
- Align internal asset management processes and practices with budgeting and long-term planning processes and practices.
- Identify asset management priorities and timelines in alignment to Provincial requirements/timeframes.
- Work with Infrastructure Services to determine what asset-management functions should be shifted to Corporate Services.
- After initial pilot project has been completed, work with Strategic Economic Development to transfer grant application writing and reporting process to Corporate Services.



Rationale / Anticipated Benefits

- 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.
- Aligned to the following Design Principles:
 - **DP1 – Contribute to achieving strategic priorities** by strengthening capacity for long-term financial planning.
 - **DP2 – Cluster functions based on their strongest synergy** by merging asset management coordination with budgeting and long-term planning.
 - **DP3 – Ensure balanced span of authority** by supporting the Director with an Assistant Manager position to focus on asset management coordination and oversight.
 - **DP5 – Demonstrate that people are valued** by expanding the responsibilities of a current position contributing to professional development and career path options

Implementation Considerations

- Thoughtful consideration to what asset management activities should be transitioned to Corporate Services and what activities should remain in Infrastructure Services.

Timing: Phase 1 Implementation

Recommendation 8

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

Details

- Develop a job description; advertise and hire this position.
- Revise the job descriptions of the Manager, IT and IT Technician to effectively align with this new position.



Rationale / Anticipated Benefits

- 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.
- Aligned to the following Design Principles:
 - **DP1 – Contribute to achieving strategic priorities** by adding capacity to leverage IT systems and tools to achieve more efficient, effective, and customer-focussed service delivery.

Implementation Considerations

- There is an opportunity to shift the current IT roles/responsibilities to best leverage a new Systems Analyst position.
- Relocate GIS Technician into Infrastructure Services area.

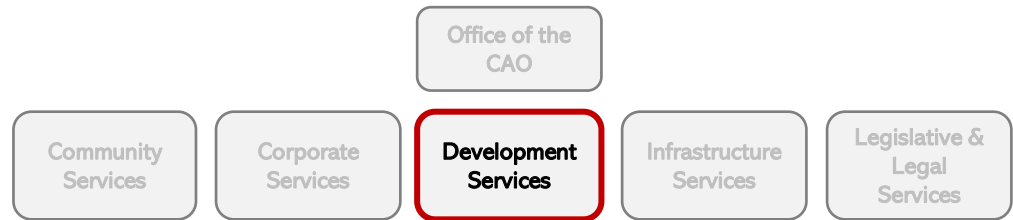
Timing: Phase 2 Implementation

2.3.4 Recommendations – Development Services

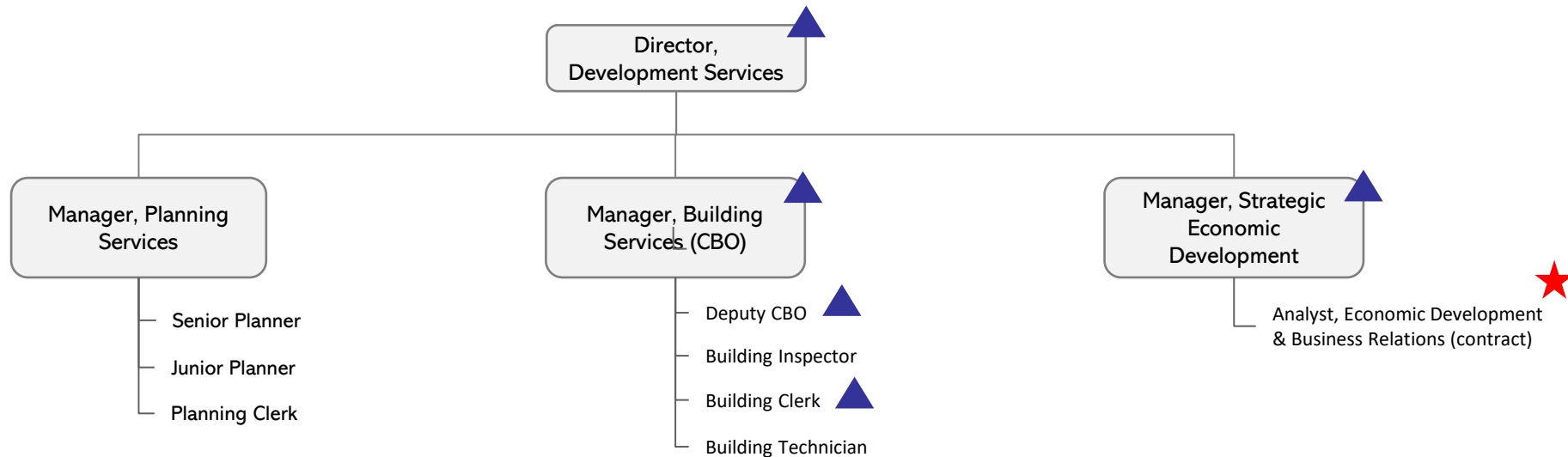
pg. 22

Roles/Responsibilities (change from status quo bolded)

- Planning Services
- Building Services (**bylaw enforcement removed**)
- Economic development
- **Strategic initiatives**



Future State Organizational Chart

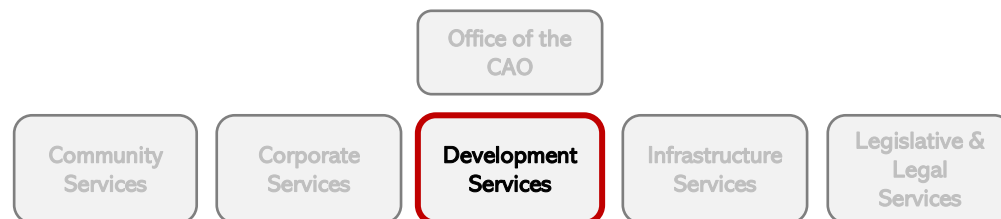


Recommendation 9

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.

Details

- After the Manager, Legal, Licensing & Enforcement has been hired, shift bylaw/property standards enforcement function and staff to the Legislative & Legal Services department.
- Revise the job descriptions of several Development Services positions removing bylaw enforcement activities.



Rationale / Anticipated Benefits

- 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.
- Aligned to the following Design Principles:
 - **DP2 – Cluster functions based on their strongest synergy** by merging bylaw enforcement with the organization's legal function. There is a high-degree of dependency with these two functions.
 - **DP3 – Ensure balanced span of authority** by allowing the Building Services division to focus on building-related functions.
 - **DP4 – Contribute to citizen-focussed service delivery** by establishing a business unit that is focussed on responding to bylaw/property standards complaints/concerns.
 - **DP6 – Realistic & affordable.** This recommendation does not require additional staff resources.

Implementation Considerations

- Shifting bylaw/property standards to Legislative & Legal Services can only be implemented after a Manager, Legal, Licensing & Enforcement has been hired ensuring effective change management during transition.

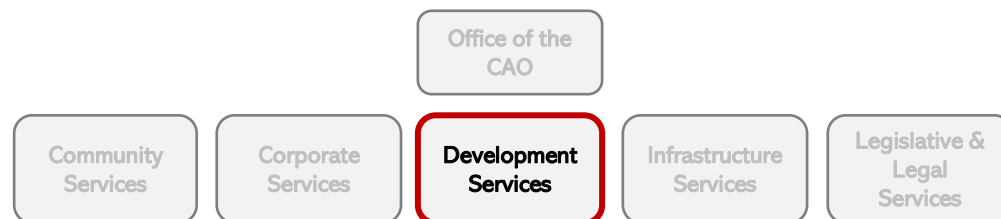
Timing: Phase 2 Implementation

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.

Details

- Establish clear mandate/priorities for the Strategic Economic Development business unit.
- Revise the job description for the Strategic Economic Development
- Develop an Analyst, Economic Development & Business Relations contract position job description; advertise and hire this position. (CLT to review the return on investment of this position after year one to determine if it is required as a permanent FT position. If so, it will be presented to Council for approval during the budget process.)
- Initiate the implementation of the grants management software project for transition to Corporate Services.



Rationale / Anticipated Benefits

- Strategic initiatives, potential alternative revenue generation opportunities, corporate sponsorship, business relations were identified as gaps. This recommendation will contribute to addressing these gaps.
- No cost to the Town for the first year for either the Analyst, Economic Development & Business Relations contract position or the Grant Match Software. These costs are covered by a provincial grant.
- Aligned to the following Design Principles:
 - **DP1 – Contribute to achieving strategic priorities** by adding capacity to pursue several action items identified in the Strategic Action Plan 2023-2027.
 - **DP2 – Cluster functions based on their strongest synergy** by merging these strategic functions within a single business unit.
 - **DP3 – Ensure balanced span of authority** by finding a “home” for functions that do not fit in other departments.
 - **DP5 – Demonstrate that people are valued** by adding a strategic function to a position contributing to professional development and career path options.

Implementation Considerations

- Clear priorities and expectations must be established for this business unit to ensure that it does not become a “junk drawer” for non-strategic activities.

Timing: Phase 1 Implementation

2.3.5 Recommendations – Infrastructure Services

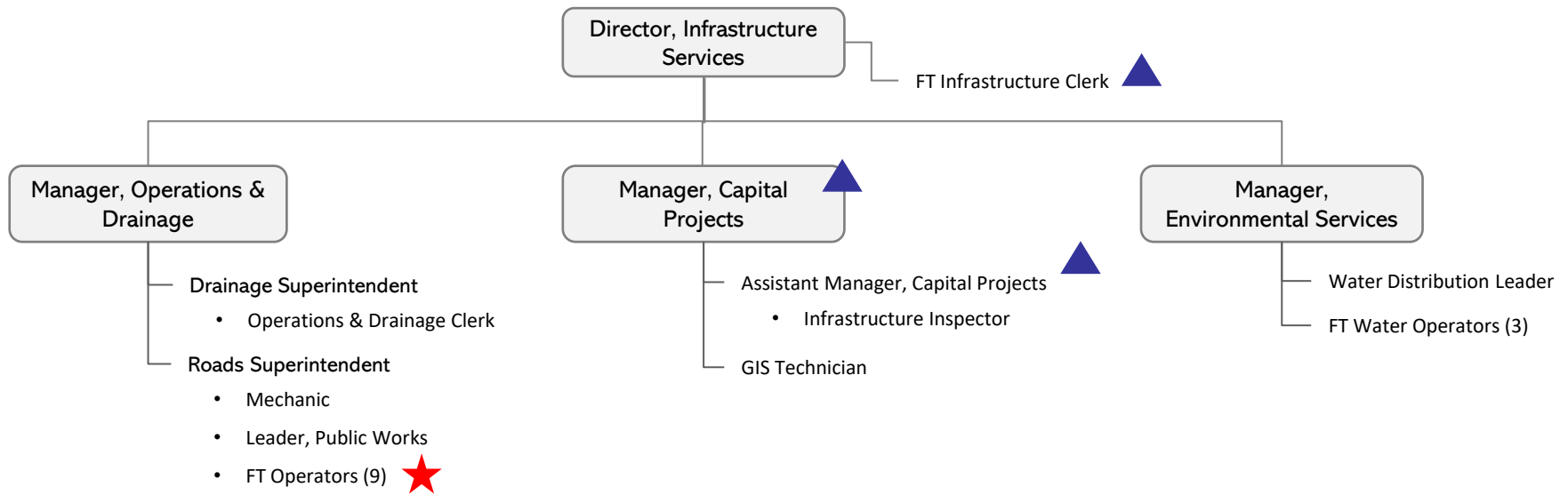
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Roles/Responsibilities (change from status quo bolded)

- Public works & operations
- Fleet & equipment maintenance
- Road maintenance
- Drainage
- **Manage major capital projects**
- **GIS & asset management support services**
- Water & wastewater



Future State Organizational Chart



Proposed New Position



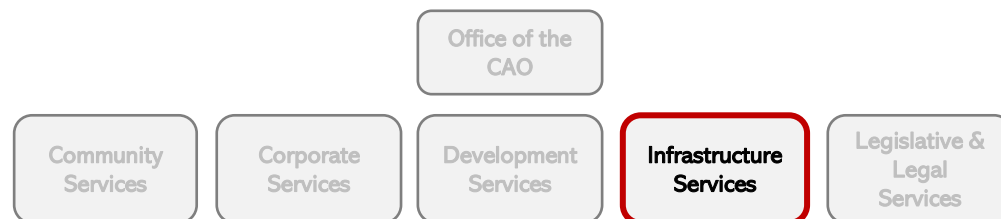
Proposed Revised Position

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; add one additional FT Public Works Operator to address capacity issues.

Details

- Validate criteria for “major projects” to be transitioned to Infrastructure Services’ Capital Projects business unit. (same as Recommendation 3).
- Revise position titles and job descriptions of Manager and Assistant Manager to reflect the refocus of this business area on capital project management. Determine which capital projects will be managed by the Manager and which project will be managed by the Assistant Manager.
- Work with Corporate Services to clarify who does what and establish clear process hand-offs:
 - Asset management coordination, systems, inventories and reporting to be “owned” by Corporate Services.
 - Capital forecasting/budgeting to be “owned” by Corporate Services with input and subject matter expertise from Infrastructure Services.
 - Infrastructure Services will continue to support Corporate Services in asset condition assessments and depreciation, acquisitions and disposals, and maintenance records.



Rationale / Anticipated Benefits

- Infrastructure Services is performing finance-related tasks, including asset management and capital forecasting/budgets. These functions are closely tied to budgeting and financial planning requiring financial expertise and skillsets.
- This recommendation contributes to addressing an urgent and time-sensitive need to comply to Provincial asset management requirements and timelines.
- Contributes to refocusing this business unit to manage major capital projects and support capital projects for other departments.
- Aligned to the following Design Principles:
 - **DP2 – Cluster functions based on their strongest synergy** by merging asset management coordination and oversight with financial services.
 - **DP3 – Ensure balanced span of authority** by taking on some of the project management activities in other departments reducing their workload and overtime hours.
 - **DP6 – Realistic & affordable.** This recommendation does not require adding staff resources to this business unit.

Implementation Considerations

- Effective implementation will require discussions with Corporate Services to identify who is responsible for what and eliminate any duplication of effort.
- Need to clearly distinguish between major and minor capital projects.
- Asset management oversight and coordination would shift to Corporate Services after Financial Analyst role is in place.

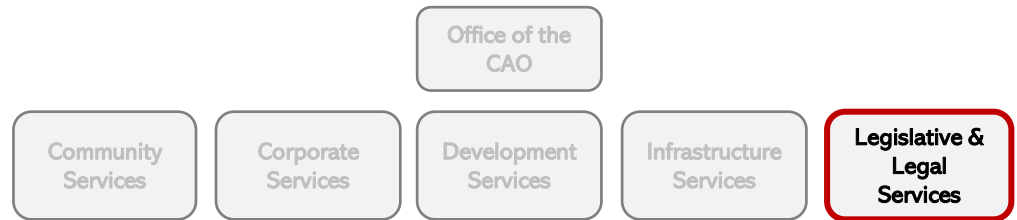
Timing: Phase 2 Implementation

2.3.6 Recommendations – Legislative & Legal Services

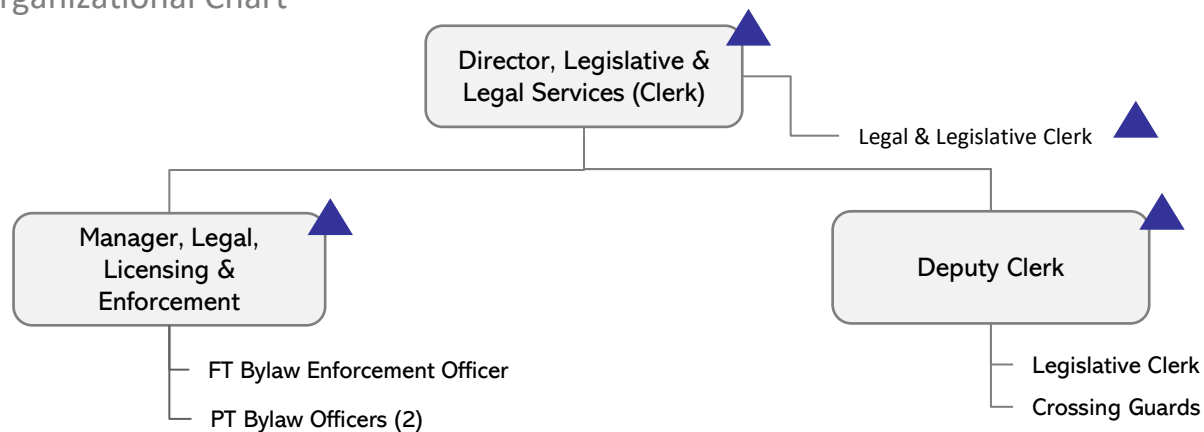
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Roles/Responsibilities (change from status quo bolded)

- Statutory Clerk functions
- Council support
- Records & bylaw management
- Crossing guards
- Internal legal support
- Licensing
- **Bylaw & property standards enforcement**

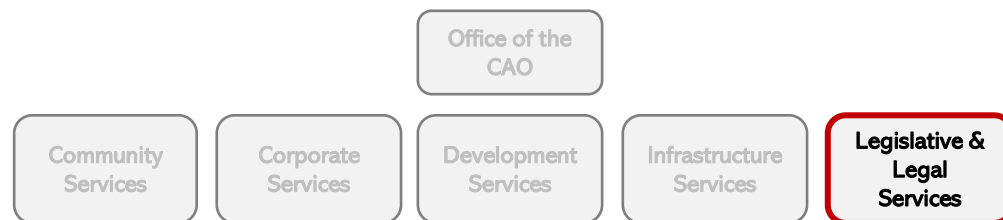


Recommended Organizational Chart



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.



Details

- A required qualification of the Manager, Legal, Licensing & Enforcement job is that this position be a lawyer.
- A required qualification for the Legal & Legislative Clerk is that this position has a legal certificate or equivalent employment experience.
- Shift the other full-time Customer Services Representative to Corporate Services' Revenue & Front Desk Services business unit.
- Shift Legislative Clerk to report directly to the Deputy Clerk.
- Shift Nurse Practitioner to report to the Manager, Human Resources.
- After the Manager, Legal, Licensing & Enforcement has been hired, shift bylaw/property standards enforcement function and staff to the Legislative & Legal Services department.

Rationale / Anticipated Benefits

- Increased community and political demand for bylaw and property standards enforcement coupled with current Town growth rates require shifting enforcement activities to Legislative & Legal Services. This configuration is consistent with trends in municipal government.
- Requiring the Manager, Legal, Licensing & Enforcement be a lawyer is expected to save approximately 70% of the cost of external solicitor services (about \$53,000 per year) and it would free up some of the Director's time.
- Liaison/discussions with the Appeals Committee will be more effective with legal and enforcement functions within the same department.
- Aligned to the following Design Principles:
 - **DP2 – Cluster functions based on their strongest synergy** by merging bylaw enforcement with the organization's legal function. There is a high-degree of dependency with these two functions.
 - **DP4 – Contribute to citizen-focussed service delivery** by establishing a business unit focussed on responding to bylaw/property standards complaints/concerns.
 - **DP6 – Realistic & affordable.** This recommendation does not require additional staff resources.

Implementation Considerations

- Effective change management will be needed to support staff in adapting to new roles and reporting requirements.

Timing: Phase 1 & 2 Implementation

New Positions (5 positions)

Assistant Manager, Facilities & Events	Reporting to the Manager, Parks & Facilities, this position will be responsible for operations and maintenance of indoor facilities and support community events.
Assistant Manager, Financial Analysis & Planning	Reporting to the Manager, Financial Services & Budgets, this position will be responsible to support budgeting and long-term financial analysis and planning; oversee a centralized asset management function; and track/coordinate the grant application/reporting process.
IT Systems Analyst	Reporting to the Manager, IT, this position would be responsible to manage and improve the Town's technology systems.
Analyst, Economic Development & Business Relations (contract position)	Reporting to the Manager, Strategic Economic Development, this contract position will support the Manager in business retention and attraction, corporate sponsorship, tourism, and the initiation and implementation of the grant management software/process for transition to Corporate Services. (Contract to be reviewed after year 1.)
Public Works Operator	Reporting to the Roads Superintendent, this additional operator will address the current staff capacity issue.

Revised Positions (18 positions)

Manager, Strategic Communications	Reporting to the CAO, the recommended change is to add customer experience oversight by chairing the proposed Customer Experience Working Group.
Assistant Manager, Parks & Projects	Reporting to the Manager, Parks & Facilities, the recommended change to this position is to focus it on managing outdoor operations and overseeing minor Community Services capital projects and supporting Infrastructure Services-led major capital project. (Current position title is Assistant Manager, Parks & Facilities.)
FT Fire Services Clerk	Reporting to the Fire Chief, the recommend change to this position is to change it from part-time to full time as recommended by the Fire Services Master Plan.
Manager, Revenue & Front Desk Services	Reporting to the Director, Corporate Services, the recommended change to this position is to focus it on organization-wide revenue analysis, managing day-to-day transactions/payments, and overseeing customer service/reception at Town Hall. (Current position title is Assistant Manager, Finance.)
Manager, Financial Services & Budgets	Reporting to the Director, Corporate Services, the recommended change to this position is to focus it on long-term financial analysis and planning, budgets, asset management, and procurement/purchasing. (Current position title is Manager, Finance & Business Services.)
Assistant Manager, Procurement & Contracts	Reporting to the Manager, Financial Services & Budgets, the recommended change is to revise the position title and job description to focus on procurement, purchasing and contracts/agreements. (Current position title is Assistant Manager, Business Services)
Director, Development Services	Reporting to the CAO, the recommended changes is to remove all bylaw enforcement functions and activities from the job description.
Manager, Building Services (CBO)	Reporting to the Director, Development Services, the recommended change is to remove all bylaw enforcement functions and activities from the job description. (Current position title is Manager, Building & Bylaws – CBO.)
Deputy CBO	Reporting to the Manager, Building Services (CBO), the recommended change is to remove all bylaw enforcement functions and activities from the job description.
Building Clerk	Reporting to the Manager, Building Services (CBO), the recommended change is to remove all bylaw enforcement functions and activities from the job description.

Revised Positions

Manager, Strategic Economic Development	Reporting to the Director, Development Services, the recommended change is to add strategic initiatives to the job description of this position. (Current position title is Manager, Economic Development.)
FT Infrastructure Clerk	Reporting to the Director, Infrastructure Services, the recommended change is to make this a full-time position to support the whole department.
Manager, Capital Projects	Reporting to the Director, Infrastructure Services, the recommended change is to remove specific asset management and finance-related activities and add major capital project management activities. (Current position title is Manager, Capital Works & Asset Management.)
Assistant Manager, Capital Projects & Assets	Reporting to the Manager, Capital Projects, the recommended change is to remove specific asset management activities and add capital project management/support activities. (Current position title is Assistant Manager, Capital Works & Asset Management.)
Director, Legislative & Legal Services (Clerk)	Reporting to the CAO, the recommended change is to add the bylaw enforcement function to this department.
Manager, Legal, Licensing & Enforcement	Reporting to the Director, Legislative & Legal Services (Clerk), the recommended change is to require this position to be a lawyer with responsibility to support the Director with legal work and oversee licensing and bylaw enforcement activities. (Current position title is Assistant Manager, Legal & Licensing.)
Deputy Clerk	Reporting to the Director, Legislative & Legal Services (Clerk), the recommended change is to remove oversight of the customer service function to focus this position on Council support and statutory legislative activities.
Legal & Licensing Clerk	Report to the Director, Legislative & Legal Services (Clerk), the recommended changes is to require this position to have a legal certificate (or equivalent experience) with responsibility to support the entire department. (Current position title is Customer Service Representative.)

3.0 Towards Implementation

- 3.1 Change Management Considerations
- 3.2 Proposed Implementation Phases
- 3.3 Phase 1 Actions & Timelines
- 3.4 Phase 2 Actions & Timelines
- 3.5 Estimated Implementation Cost Summary

- **Establish an internal implementation project lead and team.** It is essential that the CAO (with the active participation and support of CLT) is the executive lead of this team providing direction and ongoing senior-level support. Ensuring successful implementation requires an appropriate level of focus/attention.
- **Communicate (e.g. Staff Town Hall) a consistent and positive initial message.** First step of the implementation project team is to create a succinct, simple and positive message sent to all staff from the CAO/CLT that addresses the following:
 - Firstly, thanking staff for their valuable input in this project over the past few months.
 - Restate the purpose of this project and provide positive rationale for the upcoming changes.
 - Identify who is leading the implementation process.
 - Provide estimated implementation timelines.
 - Confirm that there will be opportunities for staff involvement along the way.
- **Establish a detailed project plan.** Expand Linton Consulting's high-level implementation plan to establish a detailed project plan that includes decision milestones and internal communications activities. This project plan should also include the following types of activities:
 - Identify and document shifts in staff roles, responsibilities and lines of reporting.
 - Training/coaching requirements for staff who have experienced change.
 - Ongoing touchpoints (formal and informal) between staff experiencing change and management to proactively manage change and contribute to a positive staff morale.
 - Issues mitigation/management process.
- **Ongoing Staff Feedback/Input Process.** Recognizing that change is difficult for staff, consider establishing a process for staff to communicate any concerns or issues throughout the implementation process.
- **Communicating Progress & Celebrating Success.** Celebrating success and identifying barriers to implementation progress will be a critical success factor for successful implementation. Successfully implementing a few quick wins will build positive momentum for the project.

3.2 Proposed Implementation Phases

Implementation Phases

- ❑ Successfully implementing the recommendations and action items requires a phased approach that recognizes the reality of limited resources and budgets:
 - **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: Introduce Customer Experience Working Group

R12: Establish two business units within Legislative & Legal Services and create/hire Manager, Legal, Licensing & Enforcement; implement staff changes

R2: Establish two business units within Parks & Facilities - Parks & Projects and Facilities & Events; implement staff changes

R5: Establish two business units within Corporate Services; implement management position changes

R6: Merge all Town Hall customer service/reception/bill payment functions together

R10: Expand Manager, Economic Development position to include strategic initiatives and create/fill Analyst, Economic Development & Business Relations contract position

Phase 2: Capacity Building

R9: Shift bylaw enforcement function and staff to Legislative & Legal Services

R8: Create and fill IT Systems Analyst position

R7: Centralize asset management coordination/oversight to Corporate Services and create a new Assistant Manager, Financial Analysis & Planning position

R11: Refocus Capital Works & Asset Management business unit on managing capital projects and change IS Clerk to a full-time position. Add one additional FT Public Works Operator.

R3: Shift major capital projects from Community Services to Infrastructure Services

R4: Upgrade Fire Services Administrative assistant to full-time and review Community Services program coordinator positions

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

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

3.3 Phase 1: Foundation Building (pg 1 of 3)

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Recommendation	Action Items	Who?	Timing	Change Management Considerations
R1: Introduce Customer Experience Working Group	▪ Develop terms of reference, draft agenda, meeting schedule and initial members	▪ Mgr., Strategic Communications ▪ CAO/CLT	▪ Fall 2024	▪ CAO needs to communicate the strategic importance of the Working Group to the organization. ▪ Directors must give Working Group participants time/ capacity to actively contribute.
R12: Establish two Legislative & Legal Services business units; create and hire Manager, Legal, Licensing & Enforcement; implement staff changes	▪ Develop job descriptions for new Manager position and revised Deputy Clerk position ▪ Advertise & hire new manager based on internal HR practices ▪ Shift one CSR position to become the Legal & Legislative Clerk (legal certificate required) ▪ Shift one CSR to Corporate Services ▪ Shift Legislative Clerk to report directly to Deputy Clerk. ▪ Shift Nurse Practitioner to report to the Manager, Human Resources.	▪ Dir., Legal & Legislative Services ▪ Deputy Clerk ▪ Mgr., HR ▪ CAO/CLT	▪ Fall 2024 / Winter 2025	▪ Important for the Director to involve managers and all staff in communicating role changes and future expectations of all staff.

Recommendation	Action Items	Who?	Timing	Change Management Considerations
R5: Establish two business units within Corporate Services; implement management position changes	- Revise position titles and job descriptions for the two Manager positions - Revise position title and job description of Assistant Manager, Procurement & Contracts - Job evaluation/banding process	- Dir., Corporate Services - Mgr., HR - CAO/CLT	Fall 2024 / Winter 2025	CAO and Director, Corporate Services to provide clear rationale to impacted staff re: the rationale for changes and the expectations of staff in the future.
R6: Merge all Town Hall customer services/ reception/bill payment functions together	- Minor job description changes - Reconfigure Town Hall workstations to bring all customer-facing staff together supporting a single customer counter	- Dir., Corporate Services - Mgr., Revenue & Front Desk Services - Mgr. Financial Services & Budgets - CAO/CLT - Mgr., HR	Fall 2024 / Winter 2025	CAO and Director, Corporate Services to provide clear rationale to impacted staff re: the rationale for changes and the expectations of staff in the future.
R10: Expand Manager, Economic Development position to include strategic initiatives; create/fill Analyst, Economic Development & Business Relations contract position	- Revise Manager job description - Create Analyst job description - Job evaluation/banding process - Advertise & hire new Analyst role based on internal HR practices	- CAO/CLT - Dir., Development Services - Mgr., Strategic ED - Mgr., HR	Fall 2024	Establishing clear areas of focus (based on Strategic Action Plan) in the job descriptions for both the Manager and Analyst positions to ensure they do not become a “catch all” for activities that do not fit within other departments.

Recommendation	Action Items	Who?	Timing	Change Management Considerations
R2: Establish two business units within Parks & Recreation; implement staff changes	▪ Revise current Manager and Assistant Manager job descriptions ▪ Create new job description for the new Manager, Facilities & Events position ▪ Job evaluation/banding process ▪ Advertise & hire new Assistant Manager ▪ Implement staff changes	▪ Dir., Community Services ▪ Mgr., Parks & Facilities ▪ Mgr., HR ▪ CAO/CLT	▪ Winter 2025	▪ Director, Community Services to provide clear rationale to impacted staff about the changes and the expectations of staff in the future.

Recommendation	Action Items	Who?	Timing	Change Management Considerations
R9: Shift bylaw enforcement and staff to Legislative & Legal Services	- Shift staff from reporting to CBO to reporting to the Manager, Legal, Licensing & Enforcement - Establish and communicate clear enforcement priorities & protocols	- Dir. Legal & Legislative Services - Mgr., Legal, Licensing & Enforcement - Mgr., HR - CAO/CLT	Spring 2025	- Depending on how quickly the Town can hire a Manager, Legal, Licensing & Enforcement Services, this recommendations could be implemented within Phase 1. - Need for Director, Legal & Legislative Services to establish clear expectations for enforcement staff and Members of Council about enforcement priorities and protocols.
R8: Create/fill IT Systems Analyst position	- Create job description for this position; advertise and fill position - Review/revise job descriptions of current IT Analyst position	- Dir., Corporate Services - Mgr., IT - Mgr., HR - CAO/CLT	Winter 2025	Need to review all IT job descriptions to ensure areas of speciality and avoid unnecessary role duplication.
R7: Centralize asset management coordination/oversight to Corporate Services; implement staff changes	- Create job description for the Assistant Manager, Financial Analysis & Planning and fill position - Clarify who does what asset management activities between Corporate Services and Infrastructures Services	- Dir., Corporate Services - Dir., Infrastructure Services - Mgr., Financial Services & Budgets - Mgr., HR - CAO/CLT	Summer 2025	Important to establish a job description with clear expectations for this role re: ling-term financial planning, budgets, asset management and coordination of grant applications. Need to internally communicate these expectations.

3.4 Phase 2: Capacity Building (pg 2 of 2)

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Recommendation	Action Items	Who?	Timing	Change Management Considerations
R11: Refocus Capital Works & Asset Management business unit on managing capital projects; upgrade IS Clerk to full-time position; add an additional FT Public Works Operator	▪ Revise job descriptions for Manager and Assistant Manager positions ▪ Upgrade Infrastructure Clerk to full-time position ▪ Add an additional FT Public Works Operator	▪ Dir., Infrastructure Services ▪ Mgr., HR	▪ Summer 2025	▪ Revised job description must ensure that major capital projects are handled by the Capital Projects business unit rather than the current decentralized model.
R3: Shift major capital projects from Community Services to Infrastructure Services	▪ Discussions between Community Services and Infrastructure Services to clarify roles and responsibilities re: capital projects	▪ Dir., Community Services ▪ Dir., Infrastructure Services ▪ Mgr. Parks & Recreation ▪ Mgr. Capital Projects ▪ CAO/CLT	▪ Fall 2025	▪ Important to clarify the role that Community Services will continue to play in providing subject matter expertise at key milestones of major projects.
R4: Upgrade Fire Services Administrative assistant to full-time and review Community Services program coordinator positions	▪ Revise job descriptions as required	▪ Dir., Community Services ▪ Mgr., HR	▪ Spring 2026	

3.5 Estimated Implementation Cost Summary

Phase 1: Foundation Building	Estimated Cost	Phase 2: Capacity Building	Estimated Cost
R1: Customer Experience Working Group	\$0	R9: Bylaw enforcement shift to Legislative & Legal Services	\$0
R12: Legislative & Legal Services changes	\$60,373	R8: IT Systems Analyst position	\$105,451
R5: Corporate Services changes	\$0	R7: Asset management shift to Corporate Services	\$136,689
R6: Town Hall customer service merger	\$41,331	R11: Refocus Capital Works & Asset Management & FT Infrastructure Clerk and FT Public Works Operator	\$35,216 \$101,000
R10: Economic Development changes	\$0*	R3: Shift major capital projects to Infrastructure Services	\$0
R2: Parks & Recreation changes	\$137,889	R10b: FT Analyst Economic Development & Business Retention	\$111,822
	\$239,594	R4: Fire Services Administrative Assistant / review Community Services program coordinators	\$40,676
(less legal savings)	\$(55,000)		
TOTAL ESTIMATED COSTS	\$184,594	TOTAL ESTIMATED COSTS	\$530,854

Notes:

- * First year of the new Analyst, Economic Development & Business Relations contract position is covered by a Provincial grant

Appendix A: Current Assessment: Case for Change

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1.0 Introduction

- 1.1 Context
- 1.2 Project Introduction
- 1.3 Case for Change Overview
- 1.4 Strategic Plan Direction
- 1.5 Current State Functional Model

Introduction

- ❑ One of seven municipalities within the County of Essex, The Town of Essex has a population of 21,216 and consists of four distinct urban centres - Essex Centre, Colchester, Harrow and McGregor.
- ❑ The Town offers residents a full suite of services with a full-time staffing complement of 84 staff supported by various part-time and casual employees.
- ❑ 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.
- ❑ The organization is divided into the following departments:



Need for this Project

- ❑ Organizational reviews are not about rearranging boxes on an org chart. An effective review will seek to uncover the root causes of organizational challenges while achieving the following outcomes:
 - Ensure organizational capacity to achieve strategic priorities.
 - Consider the customer experience as a primary factor in defining roles, responsibilities, and expectations.
 - Clearly define roles and responsibilities to eliminate/reduce duplication of effort and functional gaps.
 - Cluster similar/dependent functions reflecting the most efficient/effective way to get work done.
 - Balance span of authority and workloads across departments and business units.
 - Ensure an effective plan for leadership development and succession planning.
 - Build an achievable implementation strategy that recognizes the importance of effective change management.

Project Objectives & Scope

- ❑ Based on the Request for Proposal, the Town of Essex is seeking “a well-qualified, experienced consultant to review and update the organizational structure to reach optimal levels of effectiveness and efficiency in the delivery of its day-to-day requirements and services for ongoing growth and development”.
- ❑ This project will include a detailed review of the existing organizational structure for the Town and each department to ensure that the Town has the capacity to achieve the outcomes identified in the Strategic Plan. These strategic outcomes require the right organizational building blocks. Activities to be included in this assignment include:
 - Review the strengths and weaknesses of the current organizational structure and recommend changes to establish a strong foundation for long-term organizational effectiveness, continuous improvement and innovation.
 - Identify opportunities for improvements in effectiveness, efficiency and customer service.
 - Conduct a targeted comparative analysis with similarly sized municipalities to identify trends, organizational design features and innovative practices.
 - Explore the appropriateness of current staffing levels based strategic objectives and legislative requirements; incorporate a succession planning perspective.
 - Assess organizational culture strengths and weaknesses and develop recommendations contributing to positive change.
 - Provide both an Interim Report and Final Report that include options and recommendations.

Project Deliverables

- ❑ Current Assessment: Case for Change (this document) - produced at the conclusion of Phase 2, this deliverable will clearly identify internal best practices, weaknesses, any gaps in accountability, span of authority issues, unbalanced workload, service level challenges, duplication of effort and lack of alignment between strategic priorities and operational capacity. The result will be a clearly articulated case for change.
- ❑ Final Report - synthesize all analysis, findings, recommendations and an implementation plan accompanied by an Executive Summary.

Collaborative Process

- ❑ A highly collaborative, investigative approach was utilized to complete this fact-finding phase, including:
 - Review of existing documents, including the Town’s Strategic Action Plan, organizational charts, job descriptions, and other relevant reports;
 - Project launch meetings with the CAO and Corporate Leadership Team (CLT) (April 9);
 - One-on-one interviews with Mayor and CLT members;
 - Departmental/business unit interviews and group sessions (15 sessions from April 23-May 14);
 - Session with Council (May 13);
 - Staff Questionnaire (33 responses); and
 - Staff “office hours” for 1-on-1 conversations (10 sessions) with staff (May 22/23).

Theme Areas

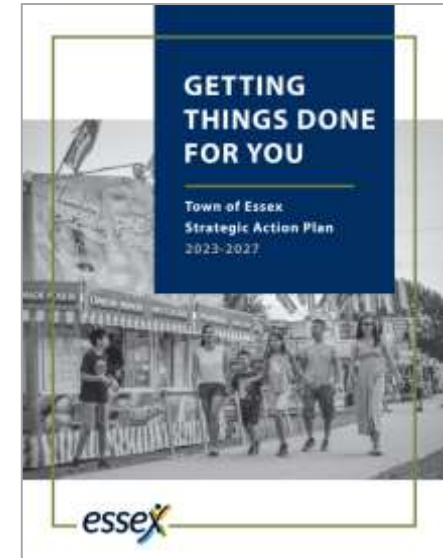
- ❑ This section represents Linton Consulting’s synthesis/interpretation of findings that have been compiled from a variety of sources, including the review of documents/reports, common themes/findings from the one-on-one interviews and group sessions.
- ❑ These findings have been categorized into the following themes:
 1. Leadership & Decision-Making
 2. Customer Service & External Communication
 3. Teamwork & Collaboration
 4. Roles, Responsibilities & Workload
 5. Process, Practices and Systems
 6. Succession Planning & Staff Morale

1.4 Strategic Plan Direction

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Strategic Plan 2023-2027

- ❑ Linton Consulting worked with the Town of Essex to create “Getting Things Done For You: Town of Essex Strategic Action Plan (2023-2027)”.
- ❑ This Strategic Action Plan establishes four main goals:

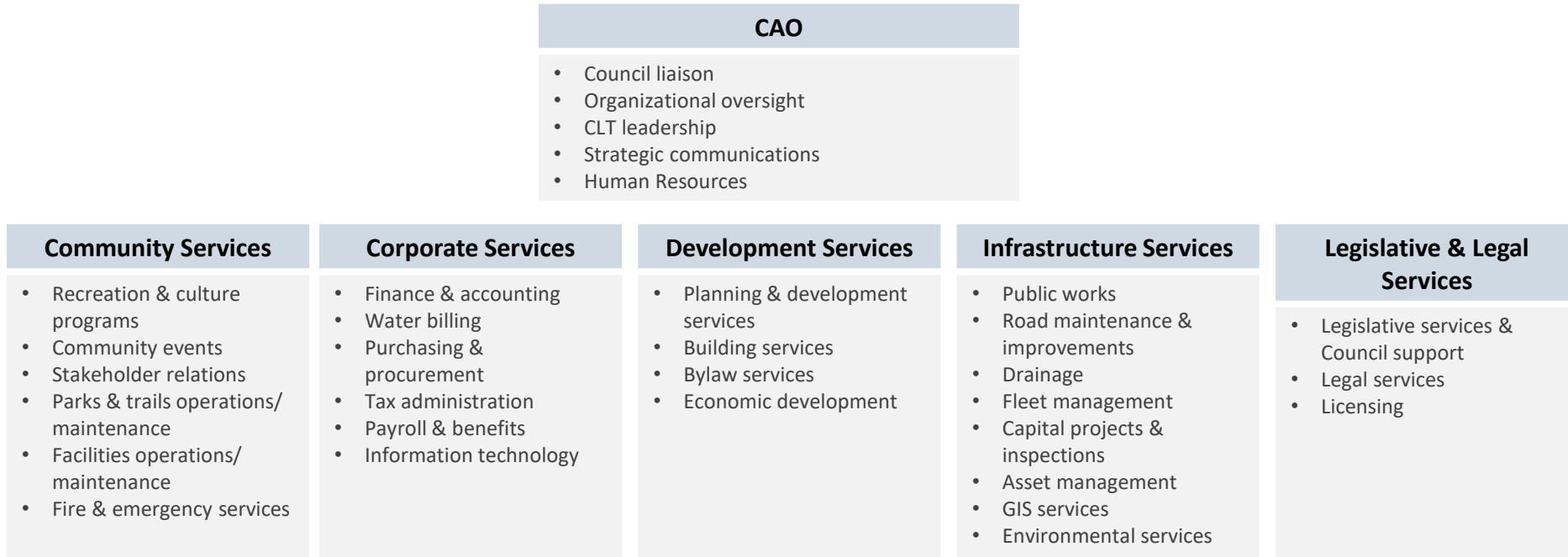


- ❑ Based on meaningful feedback from residents, this Strategic Action Plan established actions for each of these four goals.
- ❑ **Achieving these goals requires organizational excellence and administrative capacity.** The purpose of this project is to assess whether the Town of Essex has the resources, skillsets, capacity, positive working environment and organizational configuration required to achieve these strategic priorities. Changes will be recommended to contribute to organizational excellence and administrative capacity to achieve positive results.

1.5 Current State Functional Model

The “Big Picture”

- ❑ The below Current State Functional Model outlines the core functions by department/business unit:



2.0 Summary of Key Findings

- 2.1 Leadership & Decision-Making
- 2.2 Customer Service & External Communication
- 2.3 Teamwork & Collaboration
- 2.4 Roles, Responsibilities & Workload
- 2.5 Process, Practices and Systems
- 2.6 Succession Planning & Staff Morale

2.1 Leadership & Decision-Making

- ☐ Relationships among the CAO, Corporate Leadership Team (CLT) and Council are positive and respectful.
- ☐ Overall positive comments from Council and staff about the performance of the CAO and CLT in providing leadership and managing the corporation. High level of respect and teamwork among CLT members.
- ☐ Regular CLT meeting the day following Council has been identified as an internal best practice.
- ☐ CLT members are all working directors/managers and take pride in getting things done. Work-life balance and workload is a concern.
- ☐ Continual day-to-day oversight by CLT members makes it difficult to allocate time to mentoring and supporting direct reports negatively impacting succession planning efforts.
- ☐ Some concern expressed that the Deputy CAO title has not been assigned. Of the six comparative municipalities, Amherstburg and LaSalle have Deputy CAO positions. While a Deputy CAO title is common for larger municipalities, it is not as typical for smaller centres.
- ☐ Below are the common themes from the Staff Questionnaire question, “If you were the Chief Administrative Officer for a day, what two changes would you make?”:

Common Staff Responses (open field responses)	
Town hall upgrades / improve staff facilities	18%
Add more full-time staff	18%
More staff training opportunities	12%
Raise pay / competitive compensation	9%
More days off (e.g. birthdays, Family Day)	9%
Flexible workday/workweek	6%

2.2 Customer Service & External Communication

- ❑ The Town Hall customer service experience needs to improve. Currently, three separated counters provide different services frustrating customers who are often required to move from counter to counter. There is an opportunity to explore ways to reconfigure roles and counterspace to provide a better customer experience and more efficient internal processes.
- ❑ Currently, there is no accountability for customer service standards, training and expectations across the organization:
- ❑ Widespread agreement that better training on who does what is required for customer service representatives across the organization. Ineffective triaging of concerns/complaints results in inefficiency and poor/inconsistent customer service.
- ❑ Need to explore whether the customer service within Legislative Services is the best fit in this division as there is limited synergy with other legislative services functions/activities.
- ❑ Below are the most common responses to the Staff Questionnaire question, “What are the top three complaints you hear from residents about the Town of Essex?”:

Common Staff Responses (open field responses)	
Taxes / charges / fees too high	33%
Poor customer service / response time	33%
Road maintenance issues	18%
Facility cleanliness	9%
Parking	9%
Speeding / aggressive driving / truck traffic	6%
Bylaw / property standards enforcement	6%

2.2 Customer Service & External Communication (cont.)

- ❑ Below are the most common responses to the Staff Questionnaire question, “What are the top three positive comments you hear from residents about the Town of Essex?”:

Common Staff Responses (open field responses)	
Good customer service / friendly staff	79%
Small town feel / quiet / close knit community	21%
Well-maintained parks / trails / outdoor spaces	21%
Good programs	18%
Nice downtown areas	15%

- ❑ The Town has been very effective in establishing a consistent Essex brand across all departments.
- ❑ Volume of communications-related work has steadily been increasing. Shifting workload to a part-time resource (Executive Assistant) has helped manage some of this workload.
- ❑ Ongoing management of the website is a challenge. There is a need to continue shifting simple updates to the “website champions”.
- ❑ Need to explore strengthening the alignment/relationship between the communications and customer service functions. There should be some alignment between messages in (from residents) and messages out (from the Town).
- ❑ Need to explore strengthening the alignment/relationship between communications and economic development/promotion functions.

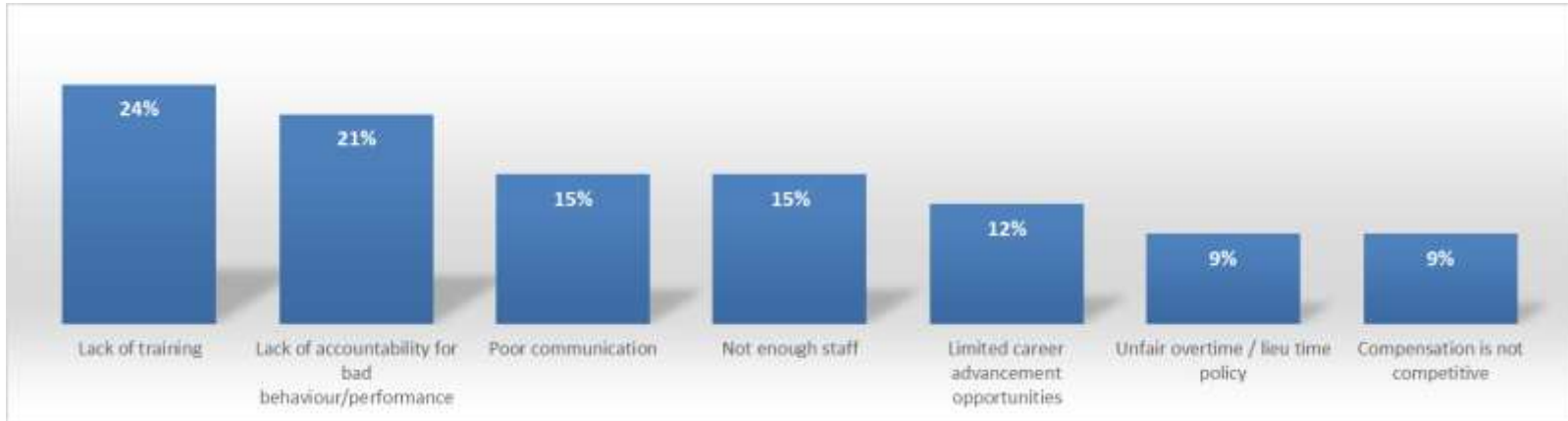
- ❑ Agreement among Members of Council and the CLT that there is a positive and respectful relationship between Council and staff with everyone working together for the good of the community.
- ❑ Responses from the Staff Questionnaire and one-on-one staff interviews suggest that there is good teamwork among staff, especially when there is a sense of urgency or a deadline.
- ❑ Positive comments from staff about their interaction with the CAO and CLT.
- ❑ In each department:
 - Community Services – overall good cross-division interaction at both the manager and staff levels. The current departmental structure supports effective collaboration.
 - Corporate Services – while staff work together to get things done, internal silos exist, and some changes are required to improve day-to-day teamwork and collaboration.
 - Development Services – overall good internal teamwork and collaboration across the three functional areas. The current departmental structure supports effective collaboration.
 - Infrastructure Services – overall good cross-division interaction. The current departmental configuration supports effective collaboration.
 - Legislative & Legal Services – staff pull together to get things done, but there is a need to consider organizational changes to improve teamwork and collaboration.

2.4 Roles, Responsibilities & Workload

- ❑ Group session, staff questionnaire responses, and 1:1 staff sessions have indicated that workload is an issue for some staff. 2023 total banked hours for non-union staff suggest the need to reduce workload in several areas:
 - Over 500 banked hours – 1 staff
 - 200-499 banked hours – 5 staff
 - 100-199 banked hours – 12 staff
 - 40-99 banked hours – 7 staff
 - 10-39 banked hours – 11 staff
- ❑ The most common response (18% of responses) to the Staff Questionnaire question, “If you were the Chief Administrative Officer for a day, what two changes would you make?” was “hire more staff”.
- ❑ A common complaint from staff was the perception that the current overtime policy was “unfair”. Some mentioned that they felt like they were “donating” time back to the organization.
- ❑ The 2017 organizational review resulted in significant restructuring. Generally, feedback received from Council, management and staff indicate that the current 5-department organizational alignment continues to work well.
 - Office of the CAO – human resources and communication reporting directly to the CAO is working well.
 - Community Services – programs/events, parks/facilities operations, and fire services work well together.
 - Corporate Services – finance, procurement, transactions/customer service, and IT is an effective blend of enabling services supporting the entire organization.
 - Development Service – merging planning, building and economic development has achieved the anticipated synergies.
 - Infrastructure Services – public works/operations, capital projects, and water/wastewater work well together.
 - Legislative & Legal Services – merging internal legal expertise with legislative/clerk function has been positive.

- ❑ While the 5-department organizational structure continues to be effective, there is a need to reconsider the configuration of functions within these departments:
 - ❑ Community Services
 - The North-South configuration of parks and facilities functions needs to be revisited. Roles and responsibilities are not clear in some areas; the workload of the current Manager is unsustainable with over eight FT and eleven PT direct reports; and there is limited career path options for staff.
 - Need to consider increased capacity in the program coordination area.
 - ❑ Corporate Services
 - Internal silos have developed between revenue-related and tax-related functions. The physical location of staff performing these have contributed to this division.
 - With one FT staff reporting to the IT Manager, the technology function continues to be under-resourced in comparison to all six comparators. (LaSalle as 6 FT IT staff, Leamington has 5; and Centre Wellington has 5.)
 - “Business Services” title does not accurately reflect the current procurement/contracts/accounts payable activities performed by this business unit.
 - ❑ Development Services
 - Strategic Action Plan identifies significant economic development priorities and actions. With one FT ED staff, there is limited capacity to these goals.
 - Need to explore whether the synergy between building and bylaw enforcement functions is stronger than the potential synergy between bylaw enforcement and legal/legislative functions.
 - ❑ Infrastructure Services
 - Some agreement that there is a need for additional FT Public Works Operator positions.
 - Need to explore whether the synergy between capital works and asset management is stronger than the potential synergy between asset management and finance functions.
 - ❑ Legal & Legislative Services/Clerk
 - Need to reconfigure the functions within this Department to effectively deliver positive results in both the legal and legislative services functional areas.
 - Need to explore whether customer service representatives are the best fit in this department.

- ❑ Results from the Staff Questionnaire question “What processes, procedures or rules frustrate you and/or limit your ability to be effective in your job?”



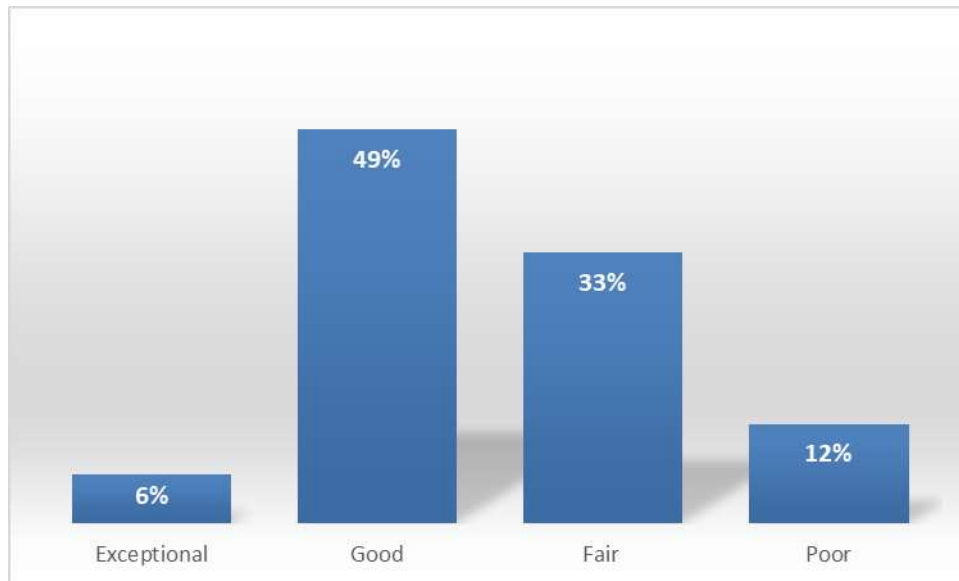
- ❑ “Report a Problem” system/process needs to be improved. It offers citizen a simple interface for their concerns/issues, but it is less effective as a workflow management system/process.
- ❑ Planning needs to implement an online system (e.g., Cloudpermit) to replace inefficient manual processes.
- ❑ Several process/functional gaps have been identified, including:
 - Grants – including researching grant opportunities, writing grants, tracking grant applications, and follow-up report writing. These activities are being done in an ad-hoc and decentralized manner across the organization. There is agreement that the Town is “leaving money on the table” due to lack of dedicated resources.
 - Corporate sponsorship – alternative revenue generation was identified in the Strategic Action Plan. It is not sustainable for this function to continue to be the sole responsibility of the Director, Community Services without additional staff support.
 - Customer service oversight – several departments have a customer-facing activities. There is no organization-wide accountability for the customer service function, including standards, training and tools.

2.6 Succession Planning & Staff Morale

- ❑ Comparing responses from 2017 and 2024 to the Staff Questionnaire question “Rate the current level of motivation & enthusiasm among those staff members that you frequently work with.” demonstrate that staff morale has improved.

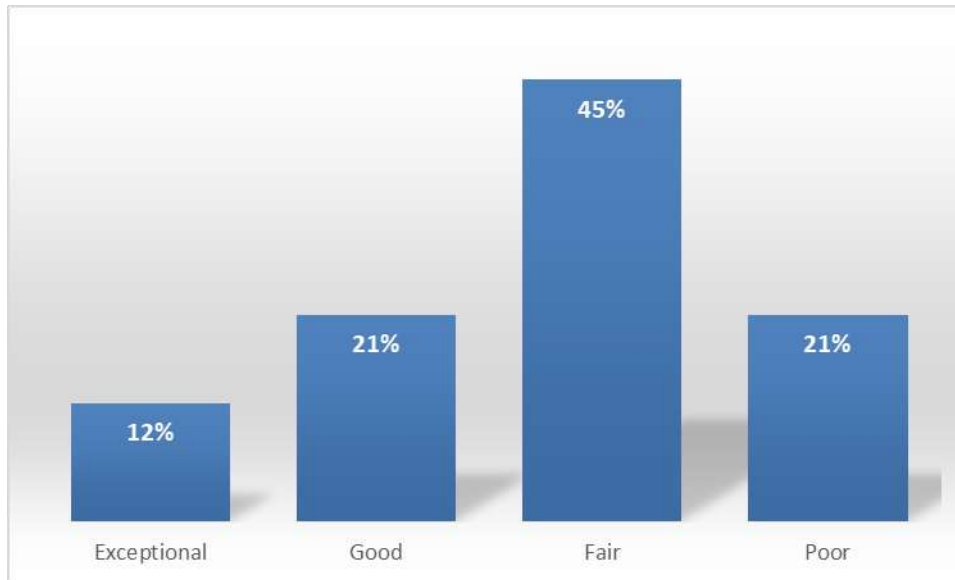
Answer Options	2017	2024
Exceptional / Very Good	21.9%	9.1%
Good	15.6%	42.4%
Fair	15.6%	36.4%
Poor	46.9%	12.1%

- ❑ Below are the results from the Staff Questionnaire question, “How effectively does the Town of Essex manage its employees?”:



2.6 Succession Planning & Staff Morale

- ❑ Below are the results from the Staff Questionnaire question, “Rate your opportunities for growth, learning and career advancement?”:

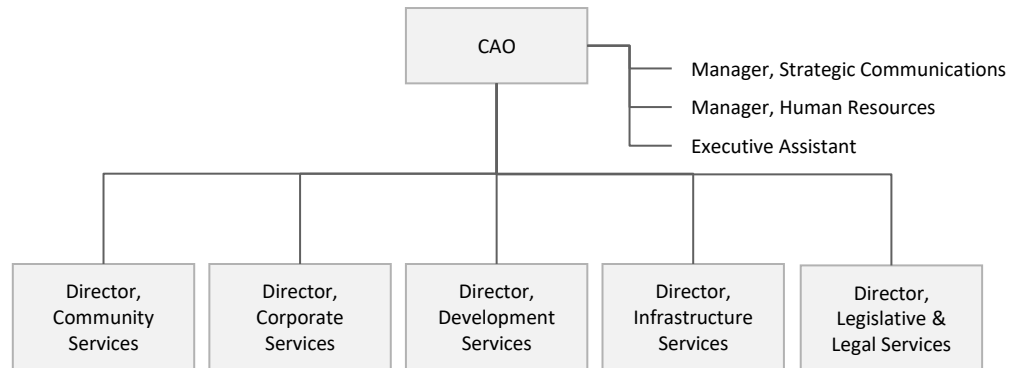


- ❑ Two full-time HR staff has significantly improved managing human resources across the organization and has resulted in good working relationship between HR and department directors and managers.
- ❑ Recruitment is a long process, and this frustrates directors/managers who need staff in place.
- ❑ Increase in the number of union grievances over the past year has caused significant staff work. Most of these grievances are related to perception that management is doing staff work. This is partially due to limited bench strength in most functional areas.

3.0 Departmental Overviews

- 3.1 Office of the CAO & Corporate Leadership Team
- 3.2 Community Services
- 3.3 Corporate Services
- 3.4 Development Services
- 3.5 Infrastructure Services
- 3.6 Legislative & Legal Services

Org Structure



Initial Findings

Corporate Leadership Team (CLT)

- Relationship between CAO, CLT and Council is positive and respectful.
- Overall positive comments from Council and staff about the performance of the CAO and CLT in providing leadership and managing the corporation. High level of respect and teamwork among CLT members.
- Regular CLT meeting the day after Council has been identified as an internal best practice.
- CLT members are all working directors/managers and take pride in getting things done. Work-life balance and burnout is a concern.
- Some concern that the Deputy CAO title has not been assigned.

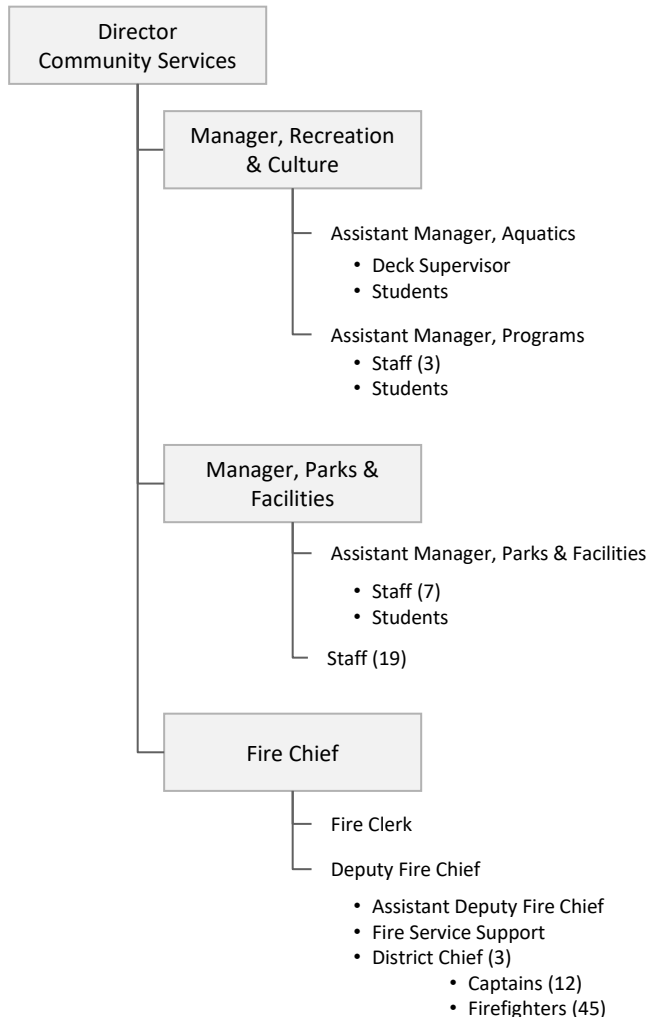
Human Resources

- Significant work has been done to improve staff relations, including ramping up internal communication efforts.
- Performance management system/process has been successfully implemented.
- Two full-time HR staff has significantly improved managing human resources across the organization and has resulted in good working relationship between HR and department directors and managers.
- Recruitment is a long process, and this frustrates directors/managers who need staff in place.
- Increase in the number of union grievances over the past year caused significant staff work. Most of these grievances are related to perception that management is doing staff work. This is partially due to limited bench strength in most functional areas.

Strategic Communications

- Effective in establishing a high-quality and consistent Essex brand across all departments.
- Volume of work has been steadily increasing. Access to a part-time resource (Executive Assistant) has helped manage workload.
- Ongoing management of the website is a challenge, and there is a need to continue to shift simple updates to the “website champions”.

Org Structure



Initial Findings

- Good cross-division teamwork at both the manager and staff levels with clarity on who is accountable for what. Current divisional structure is working well.
- Need to explore Community Services involvement in five Council committees as this requires significant time/energy.

Recreation & Culture

- Roles and responsibilities in this division are clear and teamwork is strong.
- Good relationship with Strategic Communications, and Recreation & Culture handling their own marketing is working well.
- Need to assess need to shift one PT Program Coordinator to a FT role.
- Facility maintenance/custodial is an issue that results in lack of cleanliness.

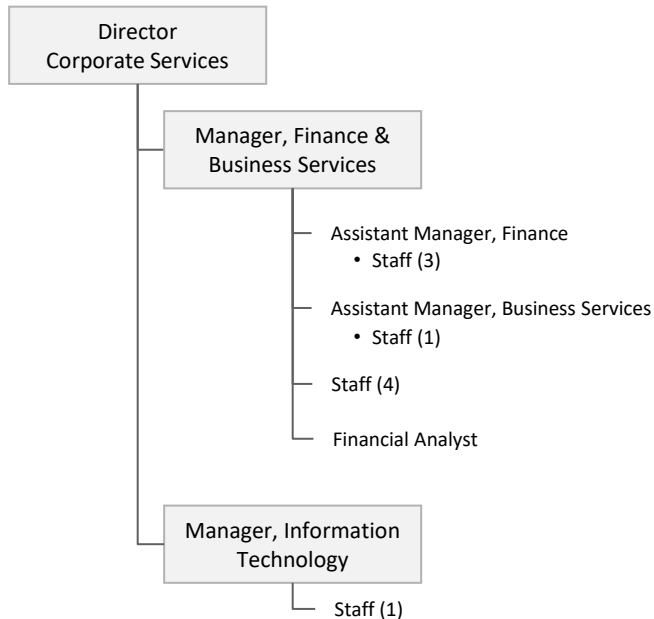
Parks & Facilities

- Positive feedback from residents regarding flower beds and park maintenance.
- Lean staff team makes it difficult to maintain parks and facilities to levels expected by Council and the community. This is especially difficult during the Spring/Fall transition time when staff shift from inside to outside work.
- Current North-South organizational configuration may not be as effective as a functionally based configuration that splits the facility from the parks function.
- Need to clarify the difference in the Horticulture Technician and the Horticulture Operator positions. Currently, they are both doing similar things.

Fire Services

- Positive morale within the Fire Department as demonstrated by significant level of interest in becoming a firefighter. Communication within the Fire Department and across the three associations has been very good.
- Fire Services within Community Services is working as demonstrated by joint community engagement efforts. This configuration also reduces the need for the Fire Chief to attend all Council meetings.
- Opportunity to have Fire involved in final inspections for all new large/multi-residential buildings.

Org Structure



Initial Findings

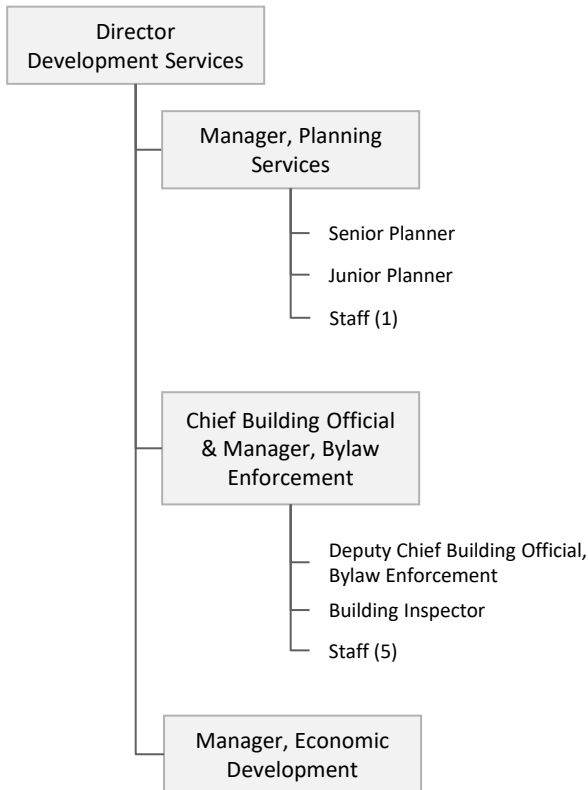
Finance & Business Services

- Water billing function has been identified as an internal best practice in terms of customer service and efficiency.
- Customer service at Town Hall needs to improve. Currently, three customer counters provide different services frustrating customers who are often required to move from counter to counter. Various services provided at these counters need to be reconfigured to provide a better customer experience – potentially a “one-stop shop”.
- The title “Business Services” does not reflect the actual procurement/purchasing, contract management, vendor relations, and accounts payable activities conducted by this business unit.
- Need to reconfigure finance business units potentially splitting day-to-day transactional operations/customer service from long-term planning and budgeting.
- Researching available grants and writing grant applications is a gap right now. There are opportunities that are not being pursued because of limited staff capacity

Information Technology

- With two FTEs, IT is under-staffed in comparison to similarly sized municipalities. This is resulting in staff workload issues and limited capacity for IT to meet the needs of the departments. The lack of a dedicated systems administrator role is a functional gap. Information and system security is a risk.
- IT is working on implementing the recommendations of the recent IT strategy project. Steering committee and a sub-committee with cross-departmental representation is identifying department needs, but with limited IT resources, this implementation is moving slowly because day-to-day issues take precedence.
- Web-based Report a Problem application and process is valuable to citizens but needs to be better aligned with staff operations. Closing the loop with citizens and Members of Council needs to improve.

Org Structure



Initial Findings

- Bi-weekly management team meetings are effective.
- Need to ensure Essex offers competitive compensation to retain staff.

Planning

- Planning and Building in the same location has been very effective and this “one-stop shop” has enhanced customer service level.
- Good teamwork/collaboration across divisions.
- Gap in the planning policy function. Limited capacity to do longer term policy-related planning (e.g. heritage, climate change, land use planning).
- Need to move forward with technology (e.g., Cloudpermit) to replace current manual processes.
- Planning and Economic Development are working well together.

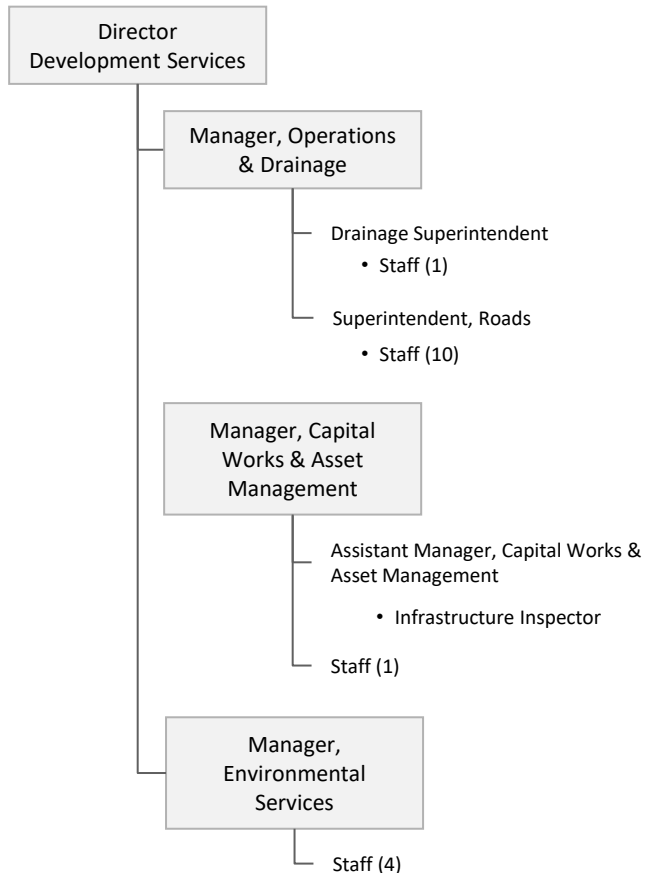
Building & Bylaw

- Implementing the Cloudpermit system has resulted in significant improvement to efficiency, effectiveness and level of customer service.
- Staff retention is a concern, and the Town is competing with Windsor and other County municipalities for qualified staff.
- Property standards and bylaw enforcement expectations from Council and the public is a concern from a staff capacity perspective. Requests for enforcement often fall outside the jurisdiction of municipal bylaw officers.
- There are some issues with the Report a Problem system/process for managing bylaw-related complaints. In addition to system glitches from time-to-time, this tends to complicate interactions among staff and between staff and the public.
- Limited synergy between building and bylaw functions. This organizational alignment should be reviewed.

Economic Development

- One FT resource is not sufficient to accomplish strategic planning priorities.
- Researching and writing grants is a gap, and the Town misses out on funding opportunities.
- Opportunity for alternative revenue generation through a sponsorship program.

Org Structure



Initial Findings

- Significantly larger capital budgets have resulted in increased staff workload manage capital projects.
- Attracting and retaining staff is an issue.

Operations & Drainage

- This division is working well, and there is a solid understanding of who is accountable for what.
- Widespread agreement that there are not enough Public Works Operators to effectively manage day to day activities.
- Need to clarify who is responsible to enforce bylaws on the right-of-way.
- “Report a Problem” system/process needs to be improved.

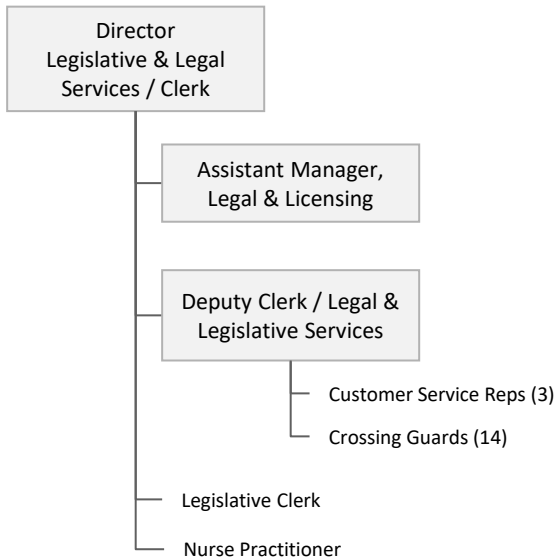
Capital Works & Asset Management

- Need to continue to strengthen the relationship between GIS and asset management functions.
- Departmental communications/interactions is positive.
- Moving forward with a 5-year plan is positive to establish a capital works plan.
- Adding an Infrastructure Inspector has resulted in additional capacity for onsite/field work freeing up Manager and Assistant Manager for getting more work done.
- Limited synergy between capital projects and asset management function and having both functions in a single division “feels forced”. There is a need to consider shifting asset management to Finance.
- Process/interaction with Business Services needs to improve.

Environmental Services

- ES team is working well together and there are no concerns with current roles and responsibilities.
- Departmental communication/interaction is positive.
- Lean team (with significant vacation time) makes it difficult to get all required work done, and staff coverage for afterhours emergencies is a risk. Current water/wastewater rate study is expected to identify future resource needs.

Org Structure



Initial Findings

- Divisions/business units within this department lack functional accountability. There is a need to reconfigure this department – potentially with one legal division and one legislative division.
- Need to explore whether the bylaw compliance function is a better fit with this department rather than with the building. Of the six comparators, only LaSalle has the building and bylaw compliance functions in the same department.

Legal & Licencing

- Need to review the current Assistant Manager, Legal & Licensing position to ensure appropriate skillset/experience. Explore the pros and cons of this position being a lawyer.

Legislative Services

- Need to explore whether the customer service function is the best fit in this division as there is limited synergy with other legislative services functions/activities.
- No organization-wide accountability for customer service standards, training and expectations. This is a functional gap.
- Widespread agreement that better training on who does what is required for customer service representatives across the organization. Ineffective triaging of concerns/complaints results in inefficiency and poor/inconsistent customer service.

4.0 Comparative Review

- 4.1 Approach & Comparators
- 4.2 Organizational Charts & Design Features
- 4.3 Comparative Finding Highlights

4.1 Approach & Comparators

Objectives, Approach & Participants

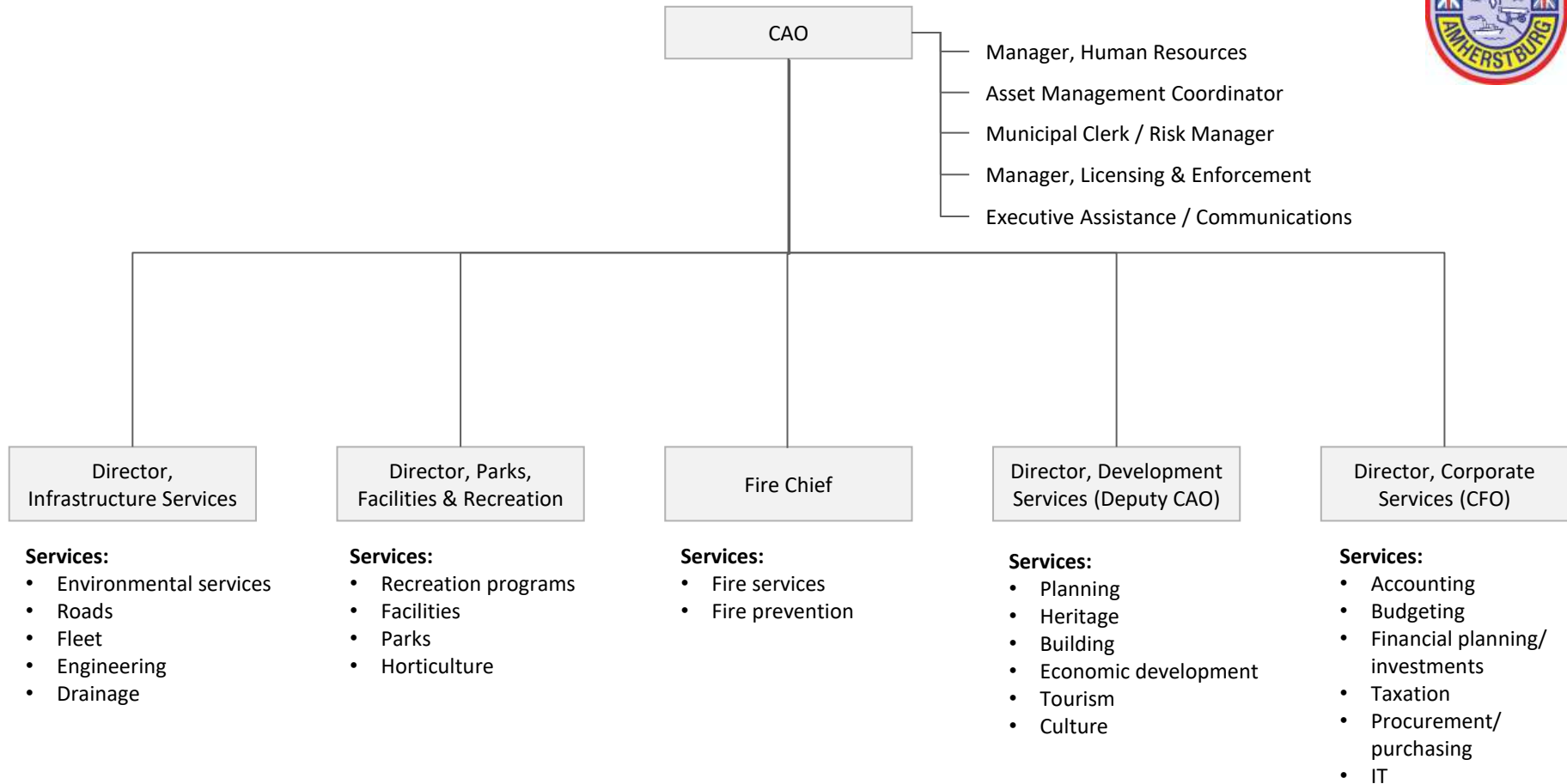
- ❑ The objective is to review the structures and practices of comparable municipalities to provide some context and document organizational design features, trends and to innovative practices.
- ❑ The criteria for selecting comparable municipalities were primarily a similar population. Four municipalities within the County of Essex and two municipalities within a two-tier environment outside of the County of Essex.
 1. Amherstburg (24,000)
 2. Kingsville (22,000)
 3. LaSalle (33,000)
 4. Leamington (27,000)
 5. Woolwich (28,000)
 6. Centre Wellington (32,000)



4.2 Organizational Charts & Design Features

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Amherstburg Organizational Model



4.2 Organizational Charts & Design Features

Amherstburg Organizational Highlights

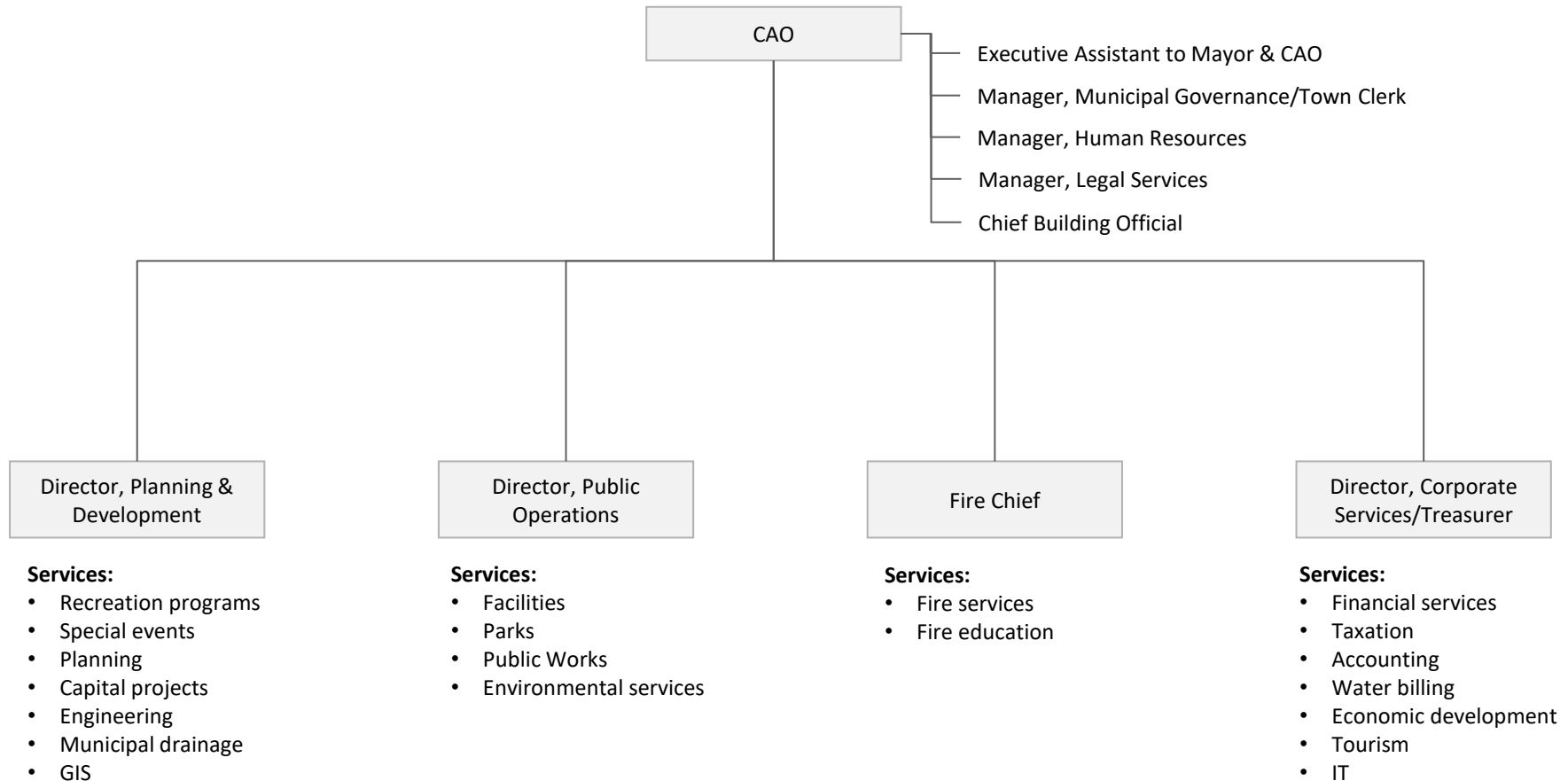
- ❑ Five departments with human resources, clerk, asset management, and licensing/enforcement functions reporting directly to the CAO; 10 direct reports to CAO
- ❑ Director, Development Services is the Deputy CAO.
- ❑ Communications is merged with economic development with 5 staff in this business unit.
- ❑ 2 customer service positions in Recreation Services and 4 clerks in Corporate Services.
- ❑ Bylaw enforcement falls under Manager, Licensing & Enforcement who reports directly to the CAO. There are 2 bylaw enforcement officers.
- ❑ Manager, Information Technology reports to Director, Corporate Services. 3 staff report to this Manager (includes 1 GIS-related position)
- ❑ Manager, Planning has 4 staff, and Manager, Building Services (CBO) has 4 staff.
- ❑ Municipal Facilities and Parks & Naturalized Areas are separate divisions each overseen by a Manager.



4.2 Organizational Charts & Design Features

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Kingsville Organizational Model



4.2 Organizational Charts & Design Features



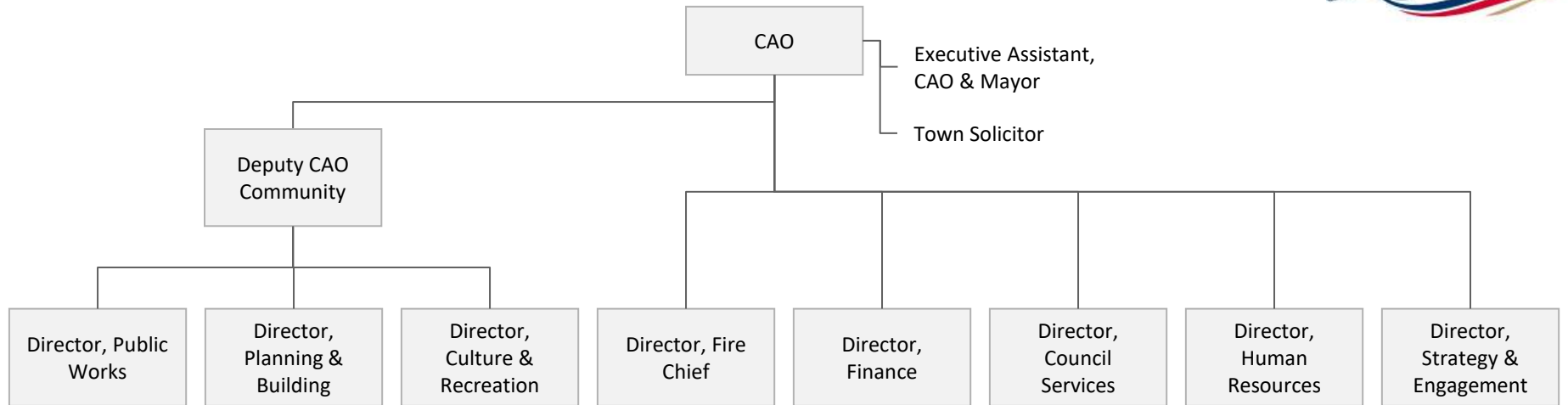
Kingsville Organizational Highlights

- ☐ Significant number of functions outside of a department that fall directly under the CAO: building, legal services, legislative services/clerk, human resources. This results in nine direct reports to the CAO.
- ☐ Kingsville does not have a Deputy CAO identified on their organizational chart.
- ☐ Economic development/tourism falls under the Director of Finance & Corporate Services. This is not a typical municipal configuration.
- ☐ Engineering and public works functions are in two different departments. This is not typical.
- ☐ Bylaw and building functions both fall under the Chief Building Official.
- ☐ Legal Services is not in the same division as Municipal Governance/Town Clerk.
- ☐ Building and Planning are not in the same division. This is not typical.
- ☐ Manager of Recreation Programs & Special Events reports to the Director of Planning & Development. This is not typical.
- ☐ Manager, IT has two direct reports:
 - IT Supervisor
 - Computer Technician
- ☐ Recreation programming is in a different department than recreation facilities.
- ☐ Customer Service falls under a Supervisor, Customer Service & Tax Revenue position reporting to the Director of Finance/Treasurer.
- ☐ Communications & Public Relations Coordinator reports to the Manager of Municipal Governance/Town Clerk.

4.2 Organizational Charts & Design Features

pg. 72

LaSalle Organizational Model



Services:

- Engineering
- Public works
- Roads
- Drainage
- Capital projects
- Parks
- Fleet
- Water
- Wastewater
- Facilities

Services:

- Planning
- Building
- Bylaw compliance

Services:

- Recreation programs
- Aquatics
- Events

Services:

- Fire services
- Fire education

Services:

- Revenue
- Taxation
- Accounting
- Payroll
- Financial services
- Procurement / purchasing
- IT
- GIS

Services:

- Legislative services / Clerk
- Records management
- Reception
- Council coordination

Services:

- Human resources

Services:

- Communications
- Promotion

4.2 Organizational Charts & Design Features

LaSalle Organizational Highlights

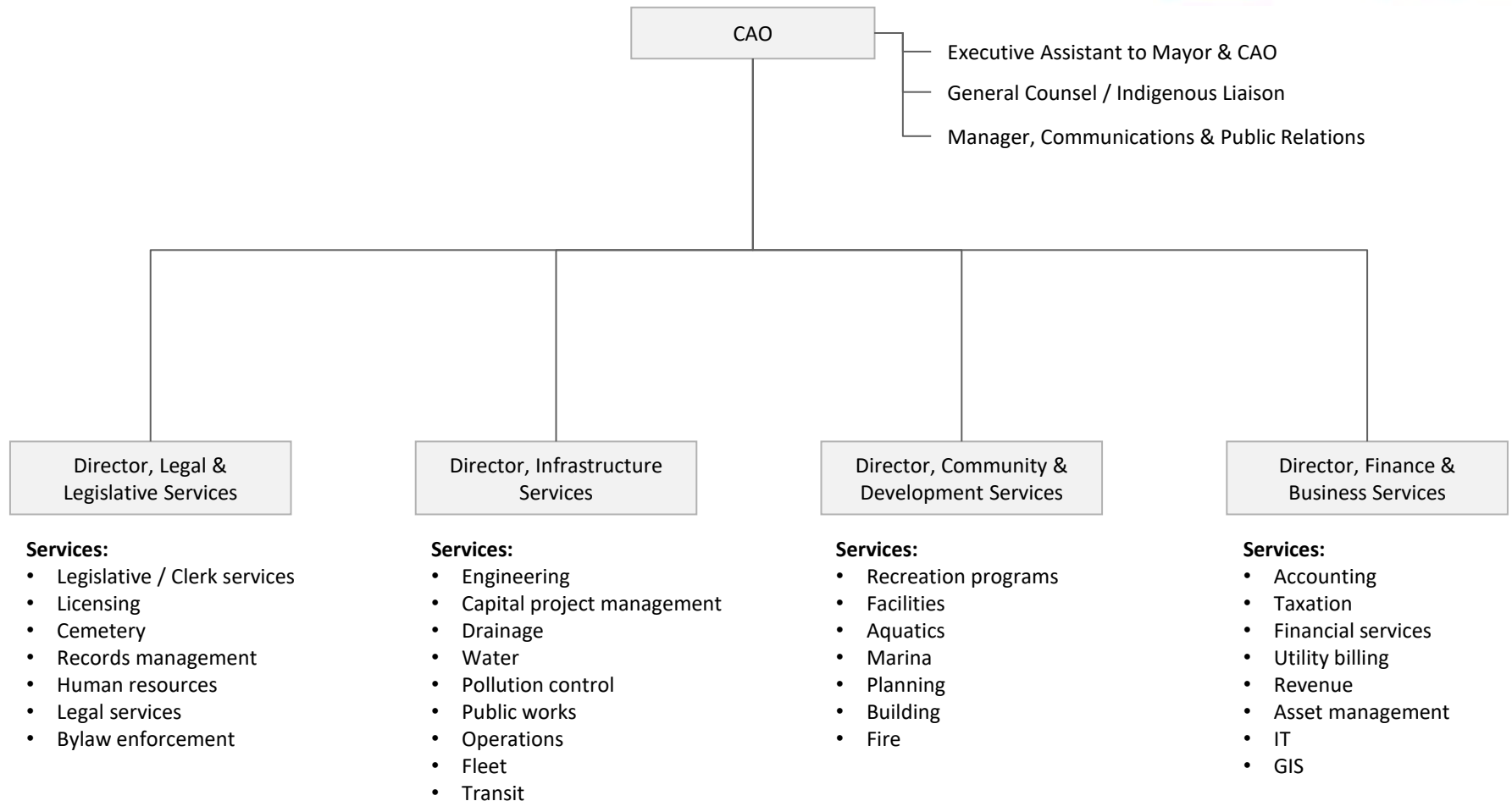


- ☐ Deputy CAO oversees community-related departments: Public Works, Planning & Building, and Culture & Recreation.
- ☐ Significantly more director-level positions than other comparative municipalities – 8 directors.
- ☐ Several 1:1 reporting relationships. This is not an organizational design best practices:
 - Supervisor, Water & Wastewater reports to Manager, Water & Wastewater
 - Supervisor, Planning & Development reports to Manager, Planning
 - Manager, Recreation reports to Director, Culture & Recreation
 - Deputy Fire Chief reports to Fire Chief
 - Supervisor, Technology reports to Manager, Technology
 - Deputy Clerk reports to Director, Council Services
 - Manager, Human Resources reports to Director, Human Resources
 - Supervisor, Communications & Promotion reports to Director, Strategy & Engagement
- ☐ Communications has four FT staff, including a director and supervisor positions.
- ☐ Human resources has three FT staff, including a director and manager positions.
- ☐ IT has six FT staff, including a manager and supervisor positions.
- ☐ Customer Service Representatives (3) report to the Supervisor, Revenue within the Finance Department.
- ☐ Parks and facilities are split into two divisions under a Manager, Facilities and a Manager, Parks & Roads.
 - Six FT Parks staff (including a Leader) and nine seasonal staff reporting to the Supervisor Parks; and
 - Eleven FT facility/maintenance staff plus PT staff reporting to the Manager, Facilities.
- ☐ No dedicated economic development staff.

4.2 Organizational Charts & Design Features

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Leamington Organizational Model



4.2 Organizational Charts & Design Features

Leamington Organizational Highlights

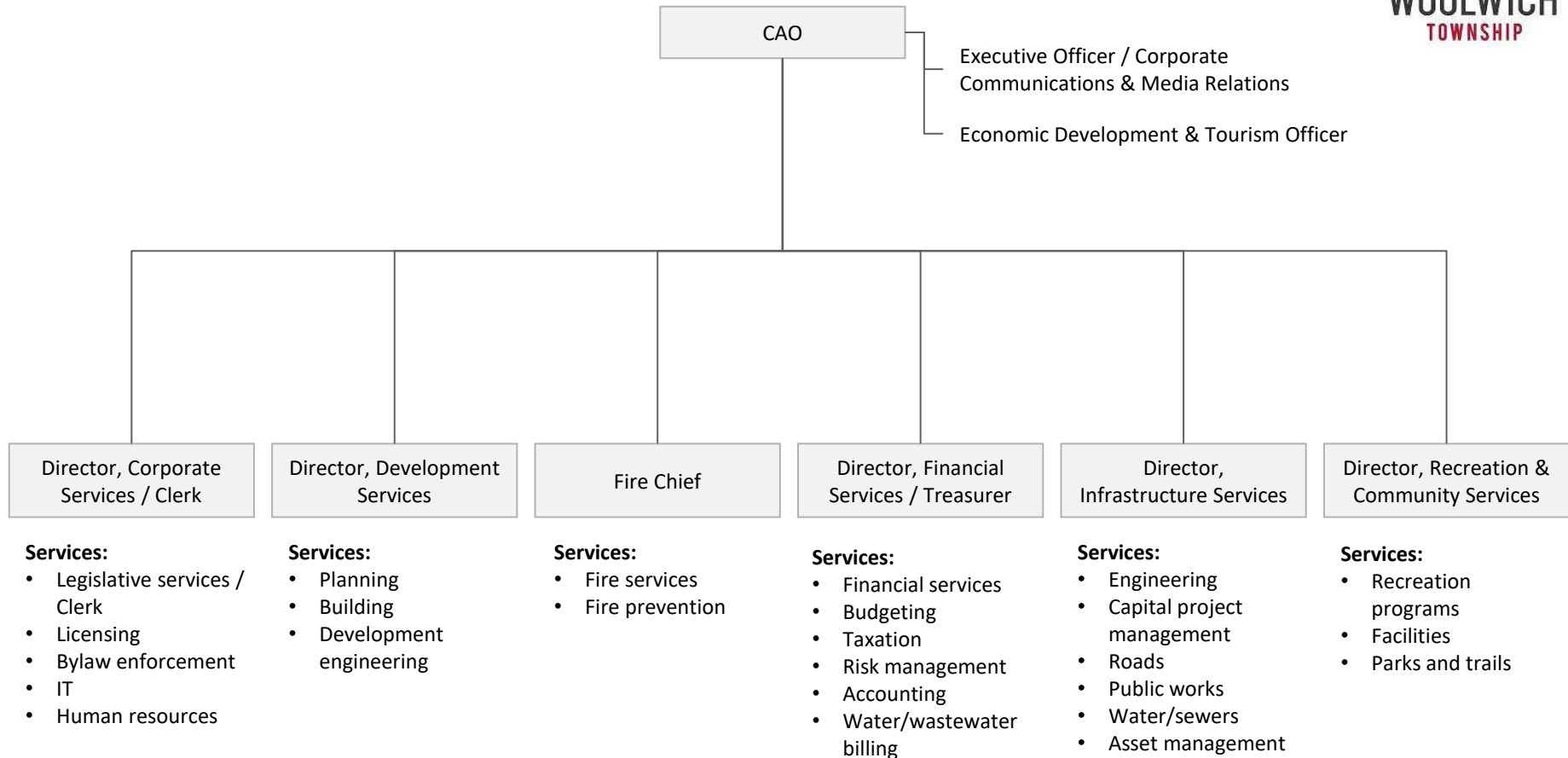
- ☐ Seven positions report directly to the CAO.
- ☐ Leamington does not have a Deputy CAO identified on their organizational chart.
- ☐ Significant internal legal capacity with two lawyers and a legal assistant reporting to the Director, Legal & Legislative Services.
- ☐ Deputy Clerk / Records Management position oversees both records management and customer service function.
- ☐ Manager, Human Resources reports to the Director, Legal & Legislative Services.
- ☐ Manager, Bylaw Enforcement reports to the Director, Legal & Legislative Services. Five bylaw enforcement officers report to this Manager position.
- ☐ Significant project management capacity with three FT Engineering Project Managers and one contract Engineering Project Manager oversee capital projects.
- ☐ Community & Development Services in a single department. This is not a typical configuration.
- ☐ Manager, Recreation oversees all programs and facility operations.
- ☐ Fire Services falls under Community & Development Services with the Fire Chief reporting to the Director, Community & Development Services.
- ☐ Manager, IT reports to the Director of Finance & Business Services. Five positions (four FT and one contract) report to this Manager including IT Systems Administrator, Applications Administrator, GIS Technologist, Desktop Support Specialist and another contract Desktop Support Specialist.



4.2 Organizational Charts & Design Features

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Woolwich Organizational Model



4.2 Organizational Charts & Design Features

Woolwich Organizational Highlights

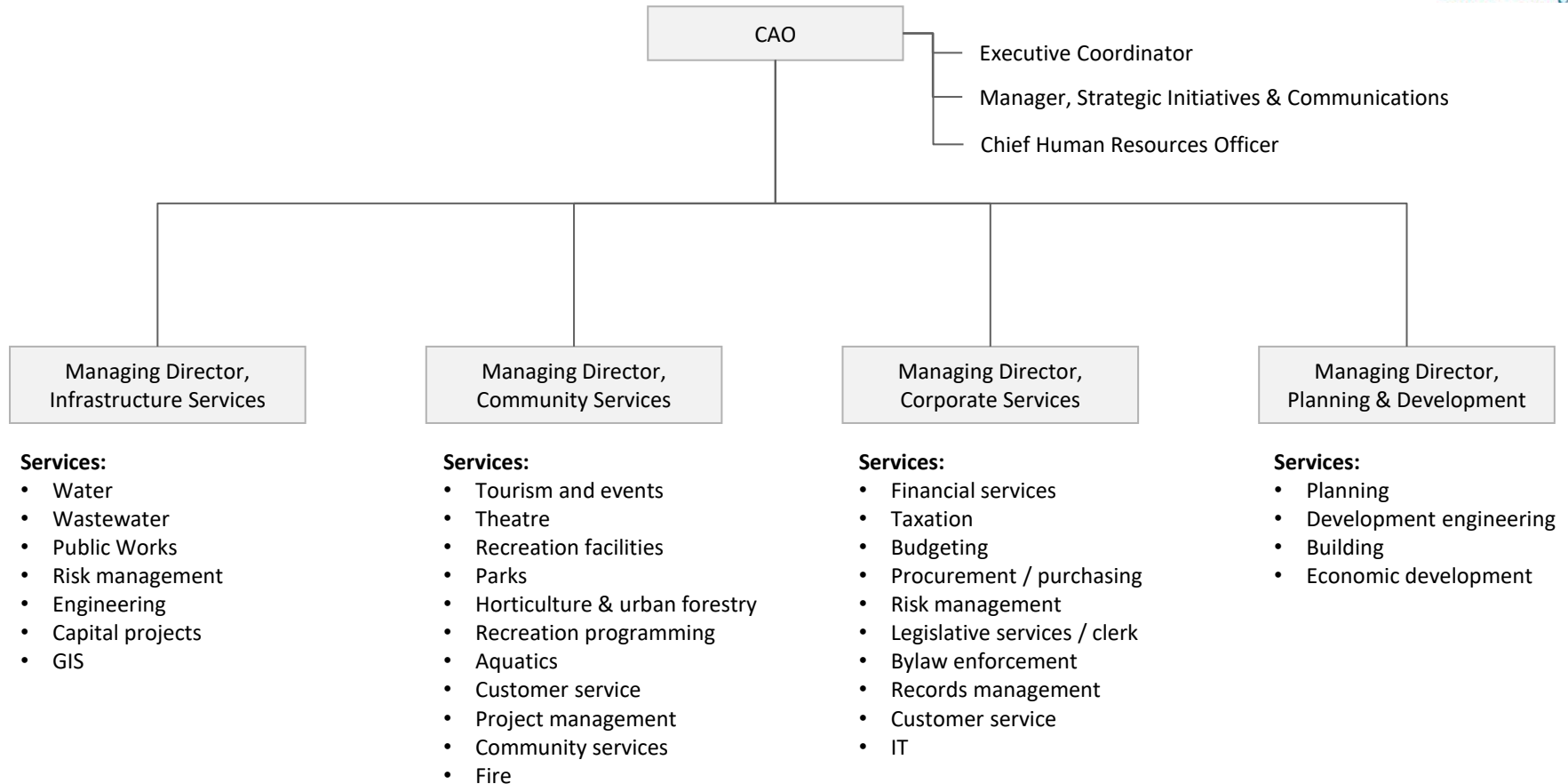
- ☐ Corporate Services/Clerk and Financial Services are split into two departments. Corporate Services/Clerk includes human resources, IT, bylaw enforcement, and customer services.
- ☐ Manager of Development Engineering and Development Engineering Technician reside within the Development Services department providing technical skillset/capacity for reviewing development applications.
- ☐ Engineering and capital projects fall within Infrastructure Services with several positions:
 - Three Engineering Project Supervisors
 - Engineering Technologist
 - Engineering Technician
- ☐ Recreation & Community Services manages their own projects through the Project Supervisor position.
- ☐ GIS sits within Development Services reporting to the Manager of Planning.
- ☐ Both Corporate Services and Financial Services have their own customer service representatives.
- ☐ Community Emergency Management Coordinator resides in the Fire Department.



4.2 Organizational Charts & Design Features

pg. 78

Centre Wellington Organizational Model





Centre Wellington Organizational Highlights

- ❑ Chief Human Resource Officer reports directly to the CAO. Four FT position report to the Chief HR Officer.
- ❑ Manager, Strategic Initiatives & Communications reports directly to the CAO. A FT Digital Media Associate reports to this Manager.
- ❑ Corporate Services includes, finance, legislative services, and IT.
- ❑ Municipal Law Enforcement Officer reports to the Manager, Legislative Services / Clerk.
- ❑ Customer service oversight falls under the Deputy Clerk position.
- ❑ Economic development is within Planning & Development while tourism and events are within Community Services.
- ❑ Manager, IT reports to the Director, Corporate Services. The IT division has the following FT staff:
 - Supervisor of IT
 - Application Support Analyst
 - Systems Analyst
 - Support Technician
- ❑ Manager, Engineering reports to the Managing Director, Infrastructure Services and is responsible for managing capital projects. The following FT staff report to this Manager:
 - Capital Projects Manager
 - Engineering Technologist (Roads & Bridges)
 - Engineering Technologist (Water & Wastewater)
 - Supervisor of GIS & Asset Management
 - Water/Wastewater Capital Project Manager
- ❑ Planning & Development has their own development engineering resources:
 - Supervisor of Development Engineering
 - Engineering Technologist - Development

5.0 Towards Recommendations

5.1 Design Principles

5.2 Direction for Recommending Change

- ❑ In addition to addressing the current operational challenges, it is important for organizational realignment to be based on recognized principles of good organizational design to ensure long-term organizational effectiveness. The below Design Principles will be used as the tool to create and evaluate functional model options:
 1. **Contribute to Achieving Strategic Priorities.** Organizational change must provide a solid foundation to ensure the municipality is positioned to deliver results based on strategic priorities.
 2. **Cluster Functions Based on their Strongest Synergies.** Organizational change must cluster functions based on the strongest synergies contributing to effective and efficient operations.
 3. **Ensure Balanced Span of Authority.** Organizational change must balance the spans of authority across the organization, both from a perspective of number of staff and number of functional areas.
 4. **Contribute to Citizen-Focused Service Delivery.** Organizational change must enhance the capacity of the municipality to provide services in an accessible, responsive and timely manner.
 5. **Demonstrate That People Are Valued.** Organizational change must contribute to employee engagement and provide viable career path opportunities.
 6. **Realistic & Affordable.** Organizational change must be achievable. Conceptual models may look good on paper, but if implementation success is improbable, the changes should not be attempted.

5.2 Direction for Recommending Change

❑ The direction for recommended organizational change will include the following three inputs:

1. **Address current organizational challenges** – it is essential that the corporate organizational structure addresses real operational issues/challenges. The Current Assessment Phase included input from management and staff through one-on-one interviews, group sessions and an online staff questionnaire. The key findings were synthesized and summarized into the following categories:
 - a) Leadership & Decision-Making
 - b) Customer Service & External Communication
 - c) Teamwork & Collaboration
 - d) Roles, Responsibilities & Workload
 - e) Process, Practices and Systems
 - f) Succession Planning & Staff Morale
2. **Consistent with organizational design best practices** – design principles based on Linton Consulting’s experience with good practices in organizational design and CLT’s understanding of current organizational challenges and future opportunities. These principles will be used to evaluate the features of several model options.
3. **Active participation and input from the CAO, CLT and staff.** Based on the above inputs, a draft Preferred Functional Model will be developed for input/revision by the CAO and CLT. Linton Consulting may also facilitate staff Challenge Sessions resulting in further revisions to recommended changes.