



GEORGINA

# Town of Georgina

Service Delivery Review (SDR)

Progress Report # 1

Presentation to Council

Marc Pourvahidi- August 9, 2017

# SDR Progress Report

## Opening Remarks

### Why Change??

“Change is the law of life and those who look only to the past or present, are certain to miss the future “

John F. Kennedy

“Change will not come if we wait for some other person or some other time. We are the ones we’ve been waiting for. We are the change that we seek”

Barack Obama

“If you always do what you’ve always done, you’ll always get what you’ve always got. If you want different or better results, be ready for change....”

# **SDR Progress Report**

## **Background**

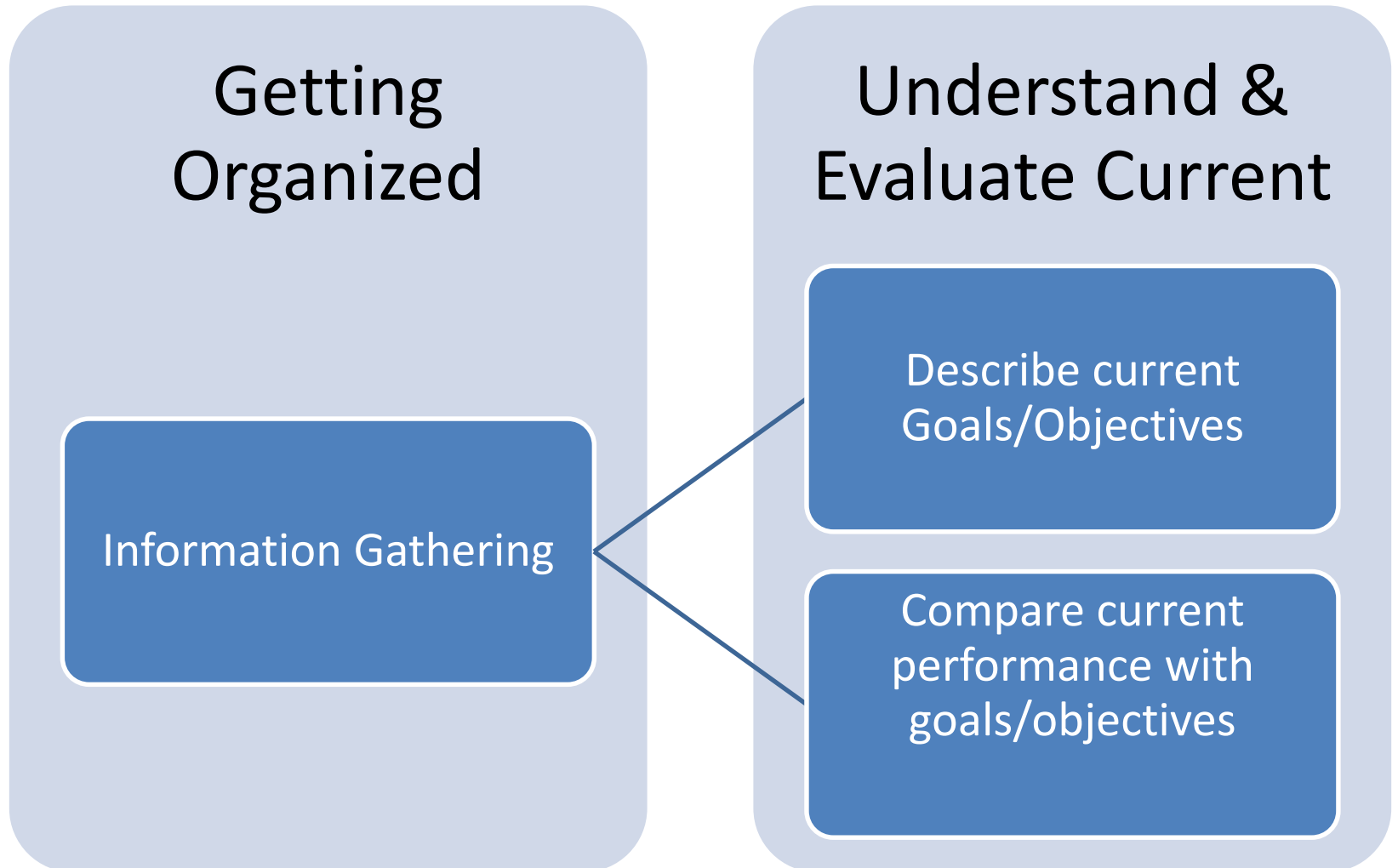
# SDR Progress Report

- Why Service Delivery Review?
  - improve service;
  - maintain existing service levels in the face of competing priorities or reduction in resources
  - meet new or increased demands
  - Improve inter-departmental relationship
  - Improve operational efficiency/effectiveness
  - Reduce costs & Increase revenues.
  - Promote/improve corporate image
  - Compete for New Growth/Development

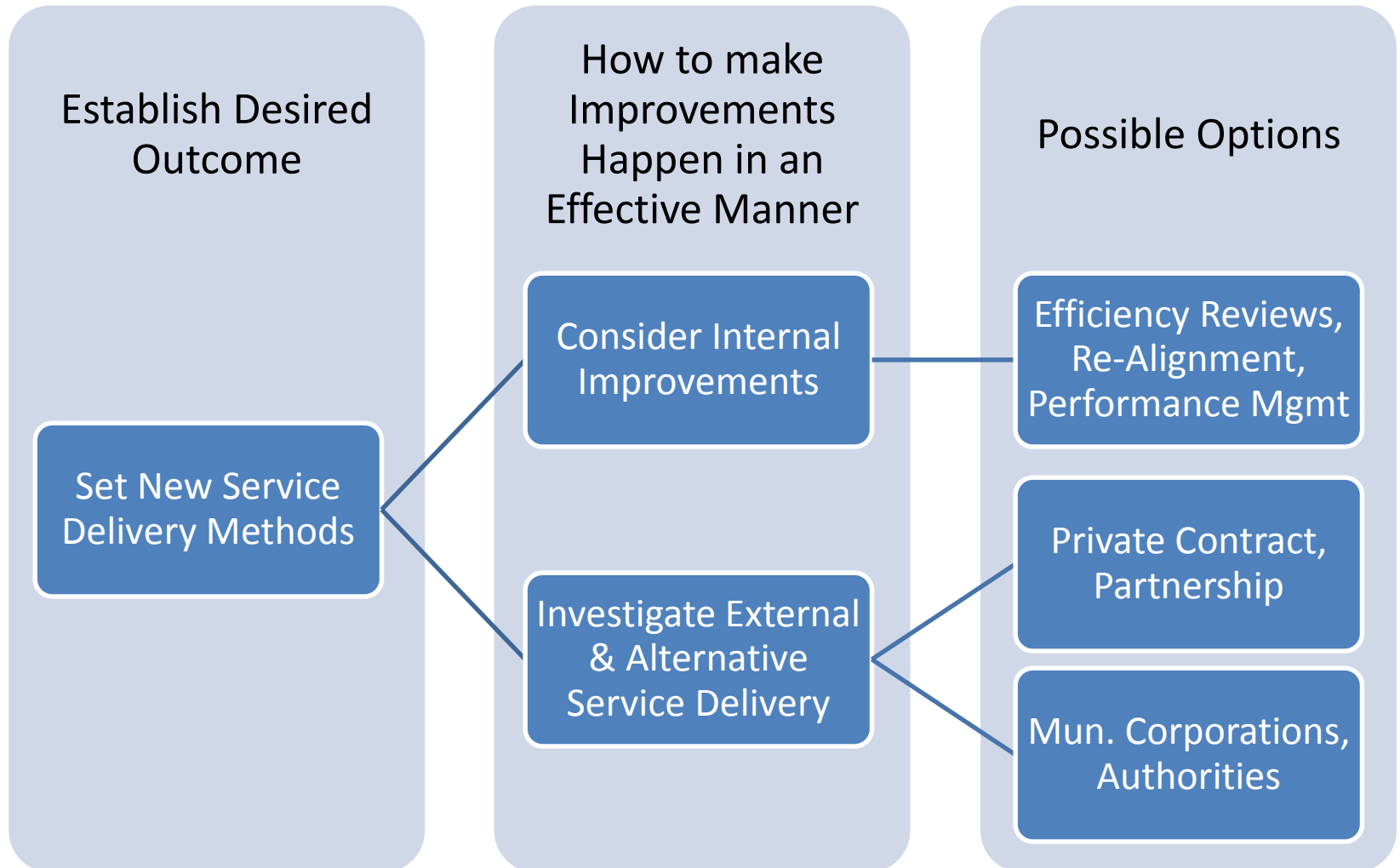
# SDR Progress Report

- Understanding how the review is conducted;
  - Operational Analysis/Core Service Review
  - Organizational/Structure Review
  - Service Management/Quality Control Review
  - Labour Relations Review/Improvement
  - Financial Analysis
  - Departmental Business Planning
  - Service Quality/Customer Service Improvement

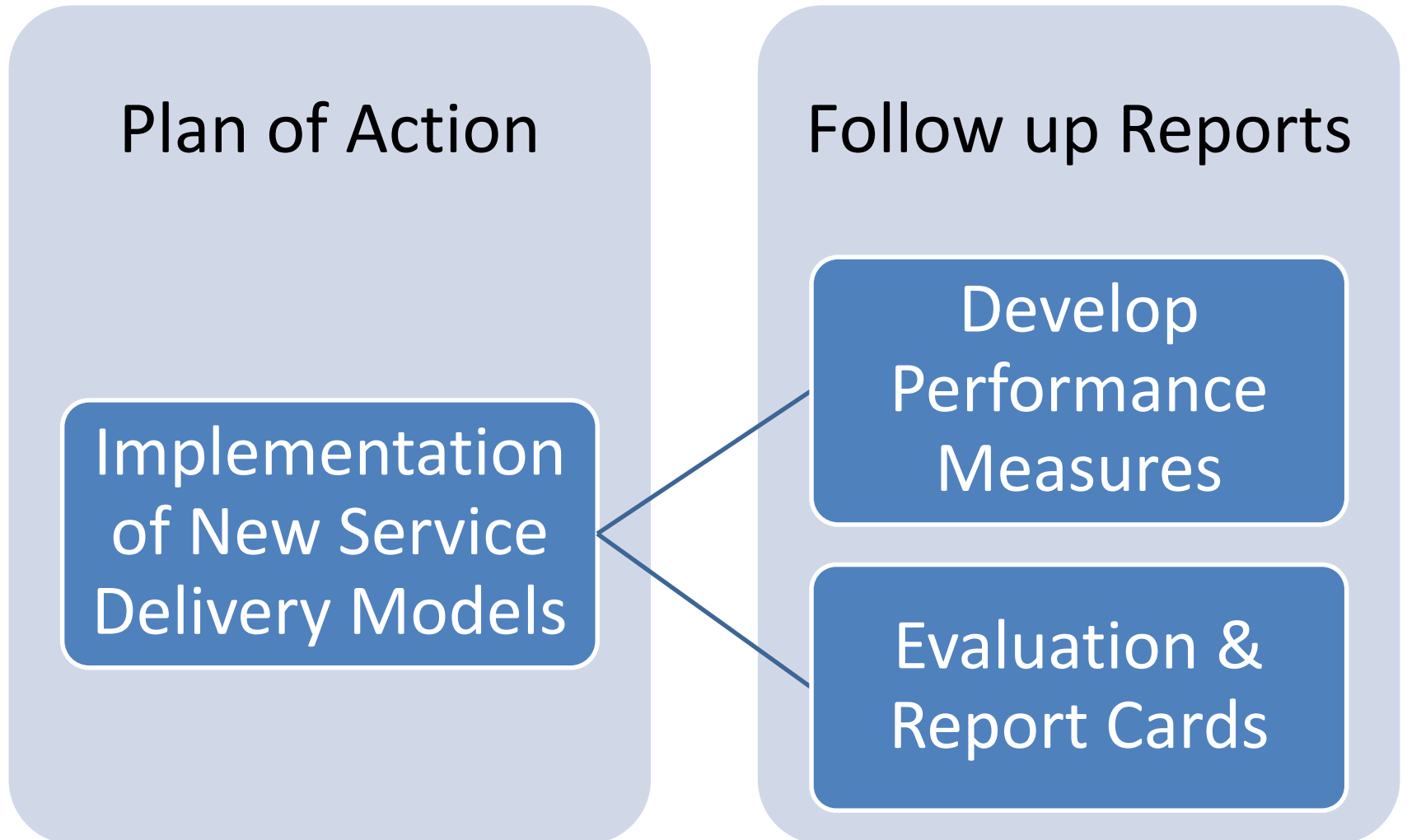
# Service Delivery Review Process



# Service Delivery Review Process



# Service Delivery Review Process





# SDR Progress Report

## Achieving the Desired Status

- Goals/Objectives:
  - Captured through Strategic Plan (Nov 2016)
  - Move forward with an emphasis on “Providing Exceptional Municipal Services”, which was continuously repeated in the Strategic Plan!
  - Focus of SDR review is a gap analysis of current status vs. the goals identified in the Strategic Plan
  - Any identified gaps will have to be part of going forward recommendations/improvements

# **SDR Progress Report**

## **Summary of Findings**

# SDR Progress Report

## Acknowledgment

Town staff are currently providing excellent municipal services that may not have been the subject of any review, nor mentioned in this presentation.

The SDR process and the findings included in this presentation had a greater focus on “areas for improvement” only.

# SDR Progress Report

## Summary of Findings (no particular order)

### High Level Internal Opportunities;

- Corporate-Wide Efficiency Issues:
  - Delegation of Authority
  - Collaborative Work
  - Effective Communication
  - Process Mapping
  - Physical Building Constraints

# SDR Progress Report

## Summary of Findings (no particular order)

### High Level Internal Opportunities;

- Capital Project Management
  - Project Delivery Challenges
  - Process/Cost Efficiency
  - Applicable knowledge/experience
  - Lack/Shortage of Funding

# SDR Progress Report

## Summary of Findings (no particular order)

### High Level Internal Opportunities;

- Human Resources
  - Performance Management/KPI
  - Talent Hiring/Leadership Development & Management Training
  - Employee Retention Planning
  - Succession Planning

# SDR Progress Report

## Summary of Findings (no particular order)

### High Level Internal Opportunities;

- Best Use of Technology
  - Fully integrated ERP system
  - Planning Application Processing Software
  - Records Management
  - HRMS System
  - Website Improvement (newsflash, daily trends, online PSR, Phone System, etc.)

# SDR Progress Report

## Summary of Findings (no particular order)

### High Level Internal Opportunities;

- Financial Management
  - Comprehensive Budget Process
  - Ten Year Capital Forecast
  - Financial Planning & Funds Availability
  - Departmental Business Plans/KPI
  - Tangible Capital Asset (CPA) Based Capital Budget Process



# SDR Progress Report

## Consultation Process

The SDR process has been conducted through active participation and discussion with:

- Elected Officials
- Chief Administrative Officer
- Senior Management Team
- Managers and Supervisors
- Staff Members
- Union Executives
- Consulting Partners
- Other Resources (e.g. Reviewing Council agenda, reports & minutes, various websites & social media)

# **SDR Progress Report**

## **Recommendations**

# SDR Progress Report

## Evaluation & Prioritization Process

To identify corporate top priorities, the findings of the SDR process were then evaluated and prioritized by the CAO and Senior Management Team against the following criteria:

- Council/Corporate Priorities
- CAO/SMT Priorities
- Staff/Union Priorities
- Legislative & Diagnostic Need for Attention
- Link to Many Town Services
- Potential Impact of the Proposed Change
- Corporate Risk for No-Action
- Ability to Implement Quickly

# SDR Progress Report

## Summary of Findings

Recommendations\*:

Senior Management Team's top priority items:

- 1- Enhanced Budgeting Process, Departmental Business Planning & Resource Allocation
- 2- Performance Review/Management for accountability purposes
- 3- Strategic Master Planning and Corporate Integration
- 4- Review the Financial System to improve Payroll/Accounts Payable functionality
- 5- Draft/present a new Procurement Bylaw and to improve Purchasing Process
- 6- Improve Council Committee/Committees Process and Support

\* For further details, please see August 9, 2017 Council Progress Report

# SDR Progress Report

## Summary of Findings

### Additional Recommendations\*:

Administrative in Nature, but Necessary to Achieve Top Priority Items as identified by SMT:

- 1- Design/Introduction of Annual Community Report
- 2- Information Technology Strategic Plan
- 3- Review of Capital Project Management Methods
- 4- Consolidation of Organizational Alignment
- 5- Revamp/update Corporate Administrative Policies
- 6- Council/CAO Decision Implementation/Tracking System

\* For further details, please see Aug 9, 2017 Council Progress Report

# SDR Progress Report

## Summary of Findings

### Additional Recommendations:

- Other items of importance are as follows:
  - 1- Civic Centre Building Constraints\*
  - 2- Organizational Structure Review\*\*

• For further details, please see August 9, 2017 Council Progress Report

\*\* CAO to address in the near future

# SDR Progress Report

## How to Make Improvements

- Plan of Action
  1. Immediate Action on the Recommendations, where feasible (authority & resources)
  2. Start the Budget Enhancement Process (priority#1)
  3. Further Training, Educational and Information Sessions on immediate Opportunities.
  4. Long Term Planning for other High, Medium & Low Priority Items be presented to Council
  5. Regular Progress Reports to Council

# SDR Progress Report

## Closing Remarks

- Roles and responsibilities of the stakeholders:

### Council:

- Consider recommendations
- Endorse the full cycle process and provide funding
- Monitor the progress and hold staff accountable
- Communicate with residents

### Management:

- Develop a Plan of Implementation for the recommendations for Council's approval
- Budget Process and Business Plans
- Consistent approach down/upward
- Develop a plan for Managers/Supervisors and staff's engagement for their responsibility & accountability



# SDR Progress Report

## Closing Remarks

- Congratulations to the entire organization, Council, Management and staff, for taking the ownership and going through this exercise
- It takes big characters to acknowledge any deficiencies, hear and consider changes that at times, may be out of our comfort zones
- Thank you for the opportunity provided to work on this project

Questions  
Comments

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