



GEORGINA



Town of Georgina Municipal Modernization Review

Council presentation
November 25, 2020



Project Objective

Further modernize services to customer

- Simplify, digitize and move online processes to improve customer convenience and organizational efficiency
- Analyze best use of phone system for efficiency and customer experience



Staff Engagement

- 7 meetings with process owners, including the CAO
- 16 discovery and current state workshops
- 16 validation and future state workshops
- 4 meetings with ITS
- 8 integration opportunity meetings
- 4 telephony related workshops
- 26 core project team meetings



Work Completed

Reviewed 16 individual processes:

- 16 Current State Maps
- 16 Opportunity Maps
- 16 Short Term Maps (6-18 months)
- 15 Long Term Maps (18-36 months)

Identified opportunities for integration

Phone system utilization review

Calculated efficiencies for the organization

OPPORTUNITY ASSESSMENT BY PROCESS

Process	Reduce Paper Files	Eliminate Scanning, Printing	Introduce On-Line Payments	Enhance Self Serve (e.g. eForms)*	Enhance use of Current Technology (for tracking and follow-up)	Eliminate Duplicate Files	Improve Information	Enhance Digital Service Delivery (e.g. Mobile Apps)
Burn Permits	√	√	√	√	√	----	√	√
Business Licences	√	√	√	√	√	----	√	----
Ditching Concerns	√	√	----	√	√	√	√	√
Flooding Concerns	√	√	----	√	√	√	√	√
Entrance Permits	√	√	√	√	√	√	√	----
Special Events	√	√	√	√	√	√	√	----
Lottery License	√	√	√	√	√	----	√	----
Resident Parking Passes	√	√	----	√	√	----	√	√
Paving Permits	√	√	√	√	√	----	√	√
Road Occupancy Permits	√	√	√	√	√	√	√	√
Sign Permits	√	√	√	√	√	----	√	----
Streetlights	√	√	----	√	√	√	√	√
Water/Wastewater Lateral	√	√	√	√	√	√	√	√
Site Alteration Permit	√	√	√	√	√	√	√	√
Internal room bookings	√	√	----	√	√	√	√	----
Internal service requests	√	√	----	----	√	----	√	√

*** Note:** As a response to COVID-19, the Town has moved ahead on enhancing and implementing some online functionality.



Integration Opportunities

Building and development permits

- Streamline various permit approval processes
- Develop customer checklists (requirements and process)
- Establish “multi functional inspectors”
- Review security payments and O&I application fees
- Establish a tracking system
- Review roles and responsibilities for managing permits



Integration Opportunities

Festivals and Special Events

- Develop a customer information package
- Develop a simplified application form
- Establish timelines for application process
- Develop Service Level Agreements (SLAs) for approvals
- Improve coordination by establishing a coordinating role
- Investigate tracking and application software
- Review the current fee structure



Integration Opportunities

On-Street Parking

- Post 'on-street parking' protocol on the website
- Establish criteria and conditions of when/where on-street parking is allowed
- Investigate software automation opportunities
- Investigate fee structure, similar to other municipalities



Phone system review

- Existing phone system is at the end of life
- New phone system to have the following components:
 - ✓ A robust reporting system
 - ✓ Call recording and logging software to capture calls for quality assessment, knowledge and skill gap analysis
 - ✓ Remote work capabilities providing the ability for all staff, when necessary, to work from home or other locations



Overall Recommendations

- Expedite shift to online self-serve
- Encourage and support customers with shift to online self-serve
- Implement short-term recommendations (6-18 months)
- Implement long-term recommendations (18-36 months)



Short Term Recommendations

6-18 months

Move Quickly

- Implement Short Term Maps
- Implement integration opportunities
- Continue to implement digital forms
- Establish a standard online payment system
- Implement electronic signatures
- Develop educational tools for customers
- Develop checklists/decision making tools



Short Term Recommendations

6-18 months

Move Quickly

- Deploy mobile apps to assist staff in tracking and fulfilling service requests
- Expand existing technologies (e.g. WorkTech) where feasible
- Offer customers the ability to create and track a specific service request
- Continue to improve additional processes through the Town's continuous improvement program
- Procure and implement a new telephony solution



Long Term Recommendations

18 - 36 months

Fully Enhanced Service Delivery

- Implement a CRM and knowledge base
- Implement the Long Term Maps
- Implement unassisted digital self-serve
- Consider a customer portal
- Monitor implementation and continue to improve



Post Implementation Benefits

Result in significant customer experience benefits including:

- Save time and money
- Ease of transaction/process completion
- Faster turnaround time



Post Implementation Benefits

Internal benefits:

- Savings primarily achieved through enhanced digital approach
- Potential annual staff hours savings, which can be reinvested in other areas of work (estimated 3,169 hours or an estimate of \$137K)
- Full savings are only realized once all aspects of the Short Term Maps are implemented
- Telephony upgrade results in additional annual potential savings of \$30,000 - \$40,000
- CRM/KB implementation results in 10-20% primarily through digital unassisted self-service



THANK YOU