An aerial photograph of Wasaga Beach, Ontario, Canada. The image shows a residential area with many houses and trees. A river flows through the middle of the town, and a beach is visible in the foreground. The image is split into two halves by a diagonal line. The left half is dark and contains text, while the right half is a clear aerial view of the town.

Town of Wasaga Beach Organizational Staffing and Customer Service Delivery Review

Final Report

September 30th, 2020

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Project Overview

Introduction and Context

Preface

The Town of Wasaga Beach (“the Town”) is a popular tourist destination with a rapidly growing population. With this in mind, the need of citizens and businesses are changing, and the expectations of service levels are increasing. This is leading to growing public demands for modernization and capital investments that will drive economic growth and enhance the delivery of programs and services. In response to the changing needs and expectations of its citizens, the Town recognized that there was an opportunity to build an efficient, customer-oriented organization and to create a community hub that includes a new co-located Twin-pad Arena and Library. To efficiently prepare and address these changes, the Town has initiated an Organizational Staffing Review and Customer Service Delivery Review.

Project Objectives

The Town has engaged MNP LLP, a Canadian Accounting, Tax, and Consulting firm, to conduct:

- 1. Organizational Staffing Review** to assess the staffing requirements for the first five years of operations for the new co-located Twin-pad Arena and Library facility; and,
- 2. Customer Service Delivery Review** to assess the operations of five municipal customer service counters to determine how the services offered may be optimized.

This review is meant to support the Town with its modernization efforts and improvements to community, culture, and recreation-based infrastructure and customer service.

The outcome of this project includes recommendations that will:

- Optimize staffing level requirements for the new Twin-pad Arena and Library facility for the first five years of operations;
- Address community views of services provided and achieve customer service efficiencies at the municipal service sites;
- Enhance the efficiency of administrative functions;
- Support Senior Management to make evidence-based decisions regarding operating and capital budget projections;
- Optimize the organizational structure design for the Customer Service and Facilities Divisions of the Recreation, Facilities and Events Department as well as the Library;
- Enhance the use of technology to improve community access to services; and,
- Improve efficiency, cost-effectiveness, and quality by achieving more with what the Town has.

Introduction and Context

Project Approach

The project approach was customized for the Town and considers the objectives and requirements of the engagement. The approach is divided into four distinct phases with two workstreams. There are points of intersection between the two workstreams in Phase 1 and Phase 4, which is why these phases are completed for both workstreams simultaneously. The activities for each phase and workstream are described in the chart below:

	Workstream 1: Organizational Staffing Review	Workstream 2: Customer Service Delivery Review
Phase 1: Project Initiation	<ul style="list-style-type: none"> • Project kick-off meeting for both workstreams • Complete stakeholder mapping exercise for a robust stakeholder engagement plan 	
Phase 2: Understanding the Current State	<ul style="list-style-type: none"> • Documentation review • Stakeholder interviews • Environmental scan • Workforce assessment for the new facility 	<ul style="list-style-type: none"> • Documentation review • Stakeholder interviews • Customer service delivery inventory • Financial analysis
Phase 3: Designing the Future State	<ul style="list-style-type: none"> • Facilitate workshops • Robust staffing model, and • Design an organizational structure for Customer Service, Facilities and Library staff groups 	<ul style="list-style-type: none"> • Comprehensive list of opportunities • Facilitate a workshop • Develop recommendations
Phase 4: Recommendations	<ul style="list-style-type: none"> • Coordination of all recommendations and implementation plans into one integrated Final Report, ensuring the alignment with, and the achievement of Council's key priorities. 	

Final Report Objectives

This report describes the final recommendations and implementation plan developed by MNP for the Organizational Staffing Review and Customer Service Delivery Review for the Town of Wasaga Beach. The contents of this report summarizes the findings from the current state analysis and the opportunity assessments and incorporates feedback from the Wasaga Beach Project Team that was collected throughout the project.

Introduction and Context

Information Collection Activities

MNP used both primary and secondary research methods to collect relevant information for both the Organizational Staffing Review and Customer Service Delivery Review:



Online research (referenced sources are provided in the footnotes of this report);



Documentation review (complete list of the documents reviewed can be found in **Appendix A**);



18 interviews with 23 key stakeholders (a complete list of the interview participants can be found in **Appendix B**); and,



Three workshops with the Wasaga Beach Project Team.



Overview of the Town of Wasaga Beach

This section provides background information about the Town as it relates to this review, namely:

- Context about the Town and the services provided;
- Responsibilities under the Municipal Act;
- Environmental Scan; and
- Strategic Priorities.

This overview is based on the findings that came out of the information collection activities described on slide 6 and serves as input into assessing the current state and developing recommendations for the optimal future state.

Overview of The Town of Wasaga Beach

An overview of the Town's municipal services, population, and geography is provided below. Emphasis is given to the Town's relationship with Simcoe County, its significant older population, and its unique elongated geography.

About the Town of Wasaga Beach¹

The Town is located on Georgian Bay and is one of 16 Townships that comprise Simcoe County. Both the Town and Simcoe County provide services to their residents and other customers such as tourists and local businesses. Provincial legislation and municipal responsibilities that are set out under the *Municipal Act* are shared between the Town and Simcoe County.

Examples of the services provided by the Town are:

- Water and sewer;
- Local roads;
- Public libraries;
- Recreation;
- Fire and police;
- Land use development control; and,
- Licensing and permitting.

Examples of services provided by Simcoe County include, but are not limited to, social housing, County roads, waste management, GIS, land ambulance, and emergency planning, and others.

The service relationship between the Town and Simcoe County is important to note as they are often required to liaise with Simcoe County, which could impact service delivery (e.g. the Library's IT is managed by Simcoe County).

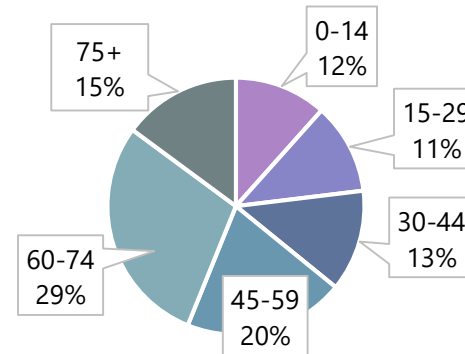
¹ Simcoe County website: <https://www.simcoe.ca/about>

² Stats Canada 2016 Town of Wasaga Beach Consensus

Demographics and Geography²

The Town services a population of 20,675 permanent residents and is forecasted to increase to a population of 27,000 by 2030². As illustrated in the graph below, 2016 data from Statistics Canada suggests that the Town has a high distribution of older residents with individuals 60+ years old comprising 45% of the population. With such a significant percentage of older residents, this demographic likely has a strong influence over the way in which municipal customer services are delivered.

Population Age Distribution²



The Town has a geographical area of 58.64 square kilometres with a population density of 352.6 per square kilometre. The downtown core is long and narrow, spread across 14 kilometres of freshwater beach. The unique and elongated geography of the Town is challenging for customer service delivery as customers may have to travel long distances between sites for their inquiries or services.

Overview of the Town of Wasaga Beach

A high-level scan of the Town's economic drivers, population and demographics, infrastructure and technology, and political and environmental factors was conducted to assess the different trends that may impact or influence the Town's operations.

Town Trends

Residents and Tourists Increase Demand for Municipal Services¹:

- The Town experiences an influx of tourists and seasonal residents during the summer months, which leads to an increase in the volume of both customers requiring municipal services and customers visiting municipal service sites. This trend presents a challenge as it places additional pressure on Town staff to service more customers with the same number of resources.
- Citizens and businesses expect enhanced service levels but are reluctant to accept higher taxes. Specifically, seasonal residents, who live in large cities, such as Toronto from the fall to spring, expect the same service levels from the Town that they receive at their permanent residence. This is challenging for Town staff to manage as service level expectations may be unattainable.

Changing Demographics²: The Town has a large senior (60+) population that drives the demand for municipal services. However, from 2011-2016, the population for the age group of 0-14 grew by 14% indicating that there is an influx of younger families moving to the Town of Wasaga Beach. The needs of this changing demographic is a consideration for programs and customer services offered by the Town as this may bring a demand for services such as summer day camps, after school sports, recreation programs, etc.

Ageing Infrastructure: The Town, like many other municipalities, owns an ageing portfolio of public infrastructure (i.e. roads, buildings, equipment) that requires maintenance and renewal and that must comply with increasingly onerous safety and regulatory standards. This may constrain the Town's budget which could negatively impact the effectiveness of customer service delivery as there would be less resources (staff time and money) to dedicate to customer service excellence.

Technological Innovation: The technology landscape is constantly evolving at a rapid pace with innovative information systems and information technologies being developed every year. These innovative technologies are dramatically changing the ways municipalities and businesses deliver services and connect with customers. As technologies advance, municipalities are expected to advance their current technology suite to maintain a competitive advantage in terms of the efficiency and effectiveness of service delivery. With this in mind, it is important for municipalities to ensure they have an IT governance structure that leverages IT as a strategic component of their organization to effectively prepare for the rapid technology advancements.

¹ Town of Wasaga Beach Tourism Strategy 2006

² Stats Canada 2016 Town of Wasaga Beach Consensus

Overview of the Town of Wasaga Beach

Town Trends (cont.)

Provincial Government: The provincial government has altered its support for Ontario municipalities in two ways:

- Reduced funding support: The Ontario Municipal Partnership Fund (OMPF) has declined by \$10 million over the past two years. This reduction in provincial transfers places greater pressure on municipalities to increase taxes to address fiscal pressures.
- Increased responsibilities: The provincial government has placed heightened pressure on all municipalities to deliver quality services, while at the same time increasing municipal responsibilities (e.g. Bill 108 and 132). This is a challenge as these changes are out of the Township's control and can impact the number and cost of services delivered and/or the way they are delivered.

Climate Change¹: Municipalities today are required to adapt to the effects of changing climates:

- The rising intensity of storms and short-term variations in temperature requires greater maintenance of roads, parks, and infrastructure. This is a challenge because these service requirements will constrain the Town's budget, reducing the resources (time and money) available to support improvements for customer service delivery.
- The trend of a warming climate suggests that the Town's beach recreation season would extend, translating into a longer tourist season and subsequently a higher volume of municipal customers. The Town should prepare in case they experience a longer busy season with more customers than expected.

The COVID-19 Pandemic: The pandemic presents many impacts to business operations:

- Canadians will likely focus on travel within Canada until the risk of international travel decreases. Given that the Town is already a popular tourist destination, the trend of vacationing within the nation may indicate higher volumes of tourists and municipal customers for the Town as people from the major cities in Ontario look for the nearest "beach destination" to explore.
- Occupancy limitations indoors (e.g. restaurants, stores, Town Hall, etc.) may need to be reduced and logistics will need to be considered to accommodate social distance requirements.
- New sanitation standards require thorough and frequent cleaning of municipal spaces which will likely require increased staffing levels to accommodate these new standards.

¹Town of Wasaga Beach Tourism Strategy 2006

Chapter One: Organizational Staffing Review

1.1. Organizational Staffing Review Current State Key Findings

This section summarizes the key findings as it relates to the organizational staffing review. An overview of the following has been provided:

- Environmental scan;
- Wasaga Beach Recreation, Events, and Facilities Department Current State Findings Summary; and,
- Wasaga Beach Public Library Current State Findings Summary.

The information provided in this section has been sourced through the primary and secondary research methods described earlier and served as input for future state recommendations and the development of an optimized staffing model.

Additional information on the current state findings of the organizational staffing review can be found in **Appendix C**.

Environmental Scan

A high-level Political, Economic, Socio-cultural, Technological, Legal, and Environmental (PESTLE) scan was conducted to assess the different environmental factors that may impact or influence the staffing requirements for the new facility. The findings of this assessment are outlined below.

PESTLE Scan

Political:

- There is some **uncertainty as to how much funding the Town will receive** from the federal and provincial governments for the new facility. Initially, it was thought that the federal and provincial governments would each provide a third of the costs, however, this amount is not guaranteed. A reduction in funding would have significant implications on the programs and services offered in the new facility and therefore would have significant implications on staffing.

Economic:

- The Town has pushed for development over the past few decades to keep up with the growing population's needs.¹ This push has brought a wide variety of businesses, including an influx of healthcare-based businesses to support the population of older adults.¹ These **businesses may potentially compete with the programs and services being offered by the Town** and will require the Town to offer competitive prices and/or unique programs and services, particularly related to the older adult population. This will influence the type of resources and staffing required.
- The **COVID-19 pandemic will have a notable impact on the Town's revenue** with reduced user fees, reduced occupancy rates of programs and services, and increased sanitation (i.e. staffing) requirements. For perspective, it is estimated that municipalities across Canada could lose nearly \$12 billion this year.² A loss in revenue will undoubtedly have an impact on the number and size of programs and services the Town can offer, which in turn will have an impact on staffing levels.

Socio-cultural:

- The Town's **overall population is anticipated to reach 27,000 residents by 2030¹**, a 30% increase from the Town's 2016 population of 20,675³. This growth will place increased demand on the Town's programs, services, and events, which will require greater resources and staffing.
- The Town's population demographics is also an important consideration, as **the Town's average age is 50 and its median age is 55.3.³** With an older population there is an increased demand for certain programs and services such as older adult programming, which can influence the type of resources and staffing required.

¹ Wasaga Beach Public Library Needs Assessment Library Profile: [Link](#)

² RBC Economics Report: [Link](#)

³ Stats Canada 2016 Town of Wasaga Beach Consensus: [Link](#)

PESTLE Scan (cont.)

Socio-culture (cont.):

- The Town is known to experience an **influx of tourists and seasonal residents** during the summer months that lead to an increased volume of customers for programs and services. For example, the Town is known for its hockey and figure skating culture, with the Ontario Hockey League (OHL) running a summer camp and the Barrie Colts training in its current Arena. This influx will likely increase with the addition of the new facility. Additional staff, perhaps seasonal and/or summer students, will be required to manage the increased traffic.

Technological:

- **Emerging technology is drastically transforming the way municipalities connect and engage with their customers.** This is especially the case in recreational and library programs and services, with customers wanting to learn and experience the latest technology. In order to remain competitive and in-demand, the REF Department and Library will need to offer digital and technological services such as 3D printing, coding, music production, competitive video-gaming, robotics, etc. Implementing these types of digital and technological services will require specialized knowledge and skills, which will influence staffing (e.g. staff training vs. experienced hire).

Legal:

- In addition to its financial impact, the **COVID-19 pandemic will also impact staffing requirements as a result of additional regulations (e.g. social distancing, sanitation, etc.)**. Additional staff may be required, even temporarily, to facilitate smaller groups and/or increase the sanitation of public spaces. It is important that the Town build its resiliency and ability to expand and contract (e.g. through the use of seasonal, contract staff, or summer students) to adapt to the changing requirements of the COVID-19 pandemic.

Environmental:

- **Warming weather associated with climate change will likely extend the Town's beach recreation season**, resulting in a longer tourist season and a higher volume of municipal customers. This may increase demand for the Town's programs and services, as tourists will be staying for longer periods of time, perhaps wanting to try out different programs and services. Additional staff, such as seasonal and/or summer students, will be required to accommodate this increased demand.

¹Stats Canada 2016 Town of Wasaga Beach Consensus: [Link](#)

Wasaga Beach Recreation, Events, and Facilities Department Current State Findings Summary

Below are the key findings that emerged from MNP's current state review of the REF Department.

Gaps in Staff Capacity and Capability

The REF Department requires additional capacity and capability in several key areas of its structure to ensure it is as efficient and effective as possible. This includes the need for an Operations Manager to alleviate the additional tasks and pressure placed on the Director, specialized trades staff (e.g. electrician, plumber, etc.), to handle more facility maintenance in-house, and additional staff to improve and accommodate the expected increase in facility maintenance, cleaning and sanitizing.

Furthermore, the Recreation Division has been challenged by limited programming and event space within its facilities, which has restricted the number and size of programs and events that can be offered. With the addition of the new facility, there will be additional and larger spaces to accommodate programs and events, however, this will likely have an impact on the number of programming staff required.

Where possible, the REF Department should look to accommodate increased program and service demand using seasonal staff, contract staff, and/or summer students. This will provide additional support to full-time staff without placing a heavy financial burden on the Town.

Inconsistent and Manual Customer Service

Facilities staff within the Arena currently manage ice bookings, including scheduling and payment, which is then manually transferred to the RecPlex for electronic processing. There is an opportunity to standardize service and payment solution offerings at each counter service site. Having an independent customer service counter within the new facility will ensure ice bookings are maximized and customers are provided with a one-stop-shop for all their customer service needs.

Customers are unable to register for programs online, which is a significant barrier from a customer service perspective. This also has implications on staffing, as recreation and customer service staff must manually register customers and provide in-person service. As such, the lack of online capability has resulted in greater work effort and time, which could be reduced with technology. There is an opportunity to streamline program registration, alleviating some of the pressure placed on staff.

Wasaga Beach Recreation, Events, and Facilities Department Current State Findings Summary

Key findings continued...

Additional Planning, Communication, and Collaboration

There are still some unknowns and pending decisions related to the new facility (e.g. design, programs and services, etc.) that will need to be determined to fully understand the impact on staffing needs. Currently, there are overlapping programs and services between the REF Department and the Library, which is a challenge in that both the REF Department and Library have relatively small budgets and therefore the duplication of programs and services is not an effective use of budget. Decisions made on programs and services should be collaborative between the two parties to ensure there is no duplication.

Furthermore, the new facility will require the Facilities staff to work alongside Library staff within shared spaces (e.g. the lobby, multipurpose rooms, hallways, etc.), which will be a significant shift as these two groups have historically had little interaction.

As such, it will be important that the REF Department and Library ensure there is strong communication and collaboration between these two groups throughout the planning, implementation, and operational phases of the new facility.

Wasaga Beach Library Current State Findings Summary

Below are the key findings that emerged from MNP's current state review of the Library.

Lack of Physical Space

The Library is in a small building that has been unable to keep up with the growing needs and expectations of the community. As a result, the Library's traffic and usage have started to plateau. For example, as a best practice, a library should have three books per capita, whereas the Library currently has one book per capita. This is primarily due to the Library's size, which limits resources and staffing. Other challenges related to the Library's size include a lack of programming space, staff workspace, multi-use/event space, and an overall challenge with the flow of traffic.

Gaps in Staff Capacity and Capability

The Library's staffing complement is quite lean at the middle-management level, limiting the number of new programs and services offered, as well as the amount of time dedicated towards administrative tasks such as staff training and planning.

There are several gaps in staffing and/or skills and capabilities that pose an opportunity for future staff recruitment for the new facility. These include:

- Community Engagement Specialist – a role dedicated to collecting feedback and engaging with the community. This position would also be responsible for marketing and advertising.
- Library Technician – a role dedicated to researching and implementing emerging technology for internal staff to utilize and to offer externally as part of programs and services (e.g. coding, 3D printing, etc.).
- Dedicated Children and Youth Program Coordinator – there is sufficient demand to warrant a full-time Children and Youth Program Coordinator or Children and Youth Librarian.

1.2. Opportunities and Recommendations Development

This section summarizes MNP's opportunities, as it relates to the organizational staffing review for the new co-located Twin-pad Arena and Library facility, and outlines the process followed to develop recommendations.

The information provided in this section has been validated by the Wasaga Beach Project Team through a series of workshops and led to the development of recommendations as described in Chapter 1.3.

Emerging Considerations and Opportunities

Key considerations and opportunities that emerged from the current state assessment have been summarized below. These have been used to inform future state planning and staff modelling.

A

Additional planning and decision-making related to the new facility is required to accurately project staffing requirements for the REF Department and Library (e.g. design/layout, programs and services, service levels, etc.).

B

The new facility will provide the REF Department and Library with additional space to increase programs, services, and/or events and will also allow both parties to serve more customers at once. This increase will have a direct impact on staffing requirements. **Opportunities to utilize shared resources, part-time/casual staff, volunteers, and partnerships should be considered.**

C

Increased communication and collaboration between the REF Department and Library is required as both parties plan to co-locate together. Areas of focus should include program and service offerings (specifically areas of overlap), service levels, shared resources, and hours of operation.

D

There are several gaps in roles and/or skills and capabilities within the REF Department and Library. **Staffing requirements for the new facility should account for these gaps and should ensure they are addressed within existing or new positions.** These include: Manager of Operations, specialized trades staff, Community Engagement Specialist, Library Technician, and a dedicated Children and Youth Program Coordinator.

E

Centralization of certain services (e.g. program and arena bookings) should be considered to alleviate the workload of staff. There are opportunities to leverage technology (e.g. online registration) to facilitate centralization and allow staff to take on other tasks and/or responsibilities.

F

The environmental factors outlined in the PESTLE scan have the possibility of influencing and/or impacting the staffing requirements for the new facility and remaining divisions in the REF Department. **It will be important to factor these considerations into future state planning and to develop proactive options for prudent planning purposes.**

Structural Recommendations

Staffing Model:

An organizational staffing model has been developed to identify future-state staffing requirements for the co-located Twin-pad Arena and Library facility.

The model is built upon assumptions that are based on MNP's current state assessment, information provided during workshops with the Wasaga Beach Project Team, and additional research conducted by MNP. The staffing levels identified in this model are based upon these assumptions made at a given point in time and are subject to change should any of the inputs change (e.g. future growth may impact staffing requirements).

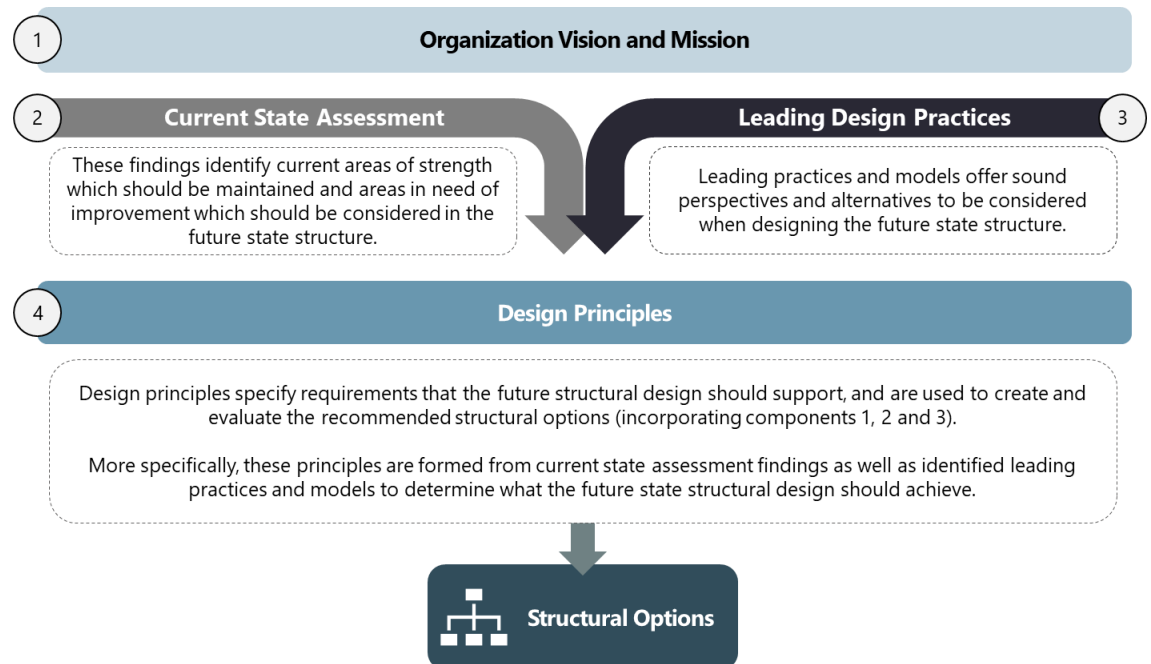
It is important to note that this model provides the total number of full-time equivalent (FTE) staff required for specific tasks, programs and/or services within the new facility. These totals were then used to develop structural options using the staffing strategy in the process shown below. Additional information on the staffing model is provided in **Appendix E**.

Structural Options:

MNP used a sound framework and process, as shown to the right, to design and develop structural options. As illustrated, each structural option is based on the four following inputs:

- 1) Organization Vision and Mission;
- 2) Current State Assessment;
- 3) Leading Design Practices; and,
- 4) Design Principles.

The design of each structural option was based on these four components, whereas staffing levels (i.e. the number of staff required) were determined based on the staffing model.



Design Principles

To guide the development and assessment of the recommended structural options, the following tailored design principles were developed based on the organization’s vision and mission, current state assessment, and leading design practices. These design principles were used to identify the requirements that the structural options should support and laid the foundation for the structural design.

Design Principles

- 1. Address the Needs of the Community**
The structure must address the needs of the community (citizens, businesses and tourists), providing programs and services that grow and adapt to the Town’s changing population (e.g. population growth, demographics, cyclical changes, etc.).
- 2. Maintain a Lean Organizational Structure**
The structure must maintain a lean organizational structure, allowing for the use of shared resources, part-time or casual staff, volunteers and partnerships.
- 3. Enable Efficient and Cost-Effective Operations and Service Delivery**
The structure must promote efficient and cost-effective operations and service delivery by facilitating communication and collaboration, centralization of functions where appropriate, and clear roles and responsibilities.
- 4. Align to the Organization’s Strategic and Operational Plans**
The structure must have clear alignment to the Town’s strategic and operational plans. For example, the structure must support the Town’s proactive approach to facility management as outlined in the Asset Management Plan.
- 5. Support Career Development and Succession Planning**
The structure must support career development and succession planning by allowing for sufficient growth opportunities and ensures organizational agility and resiliency.

1.3. Organizational Staffing Review Recommendations

This section summarizes MNP's recommendations as it relates to the organizational staffing review for the Twin-pad Arena and Library (new facility). The recommendations within this section relate to the in-scope positions as outlined in the organizational chart for the REF Department (pg. 23) and Library (pg. 27). Identified in-scope positions are those that are dedicated to the new facility (e.g. the Twin-pad Facility Operator is a dedicated position within the new facility whereas the Facilities Foreman provides oversight and direction to the Facilities Division).

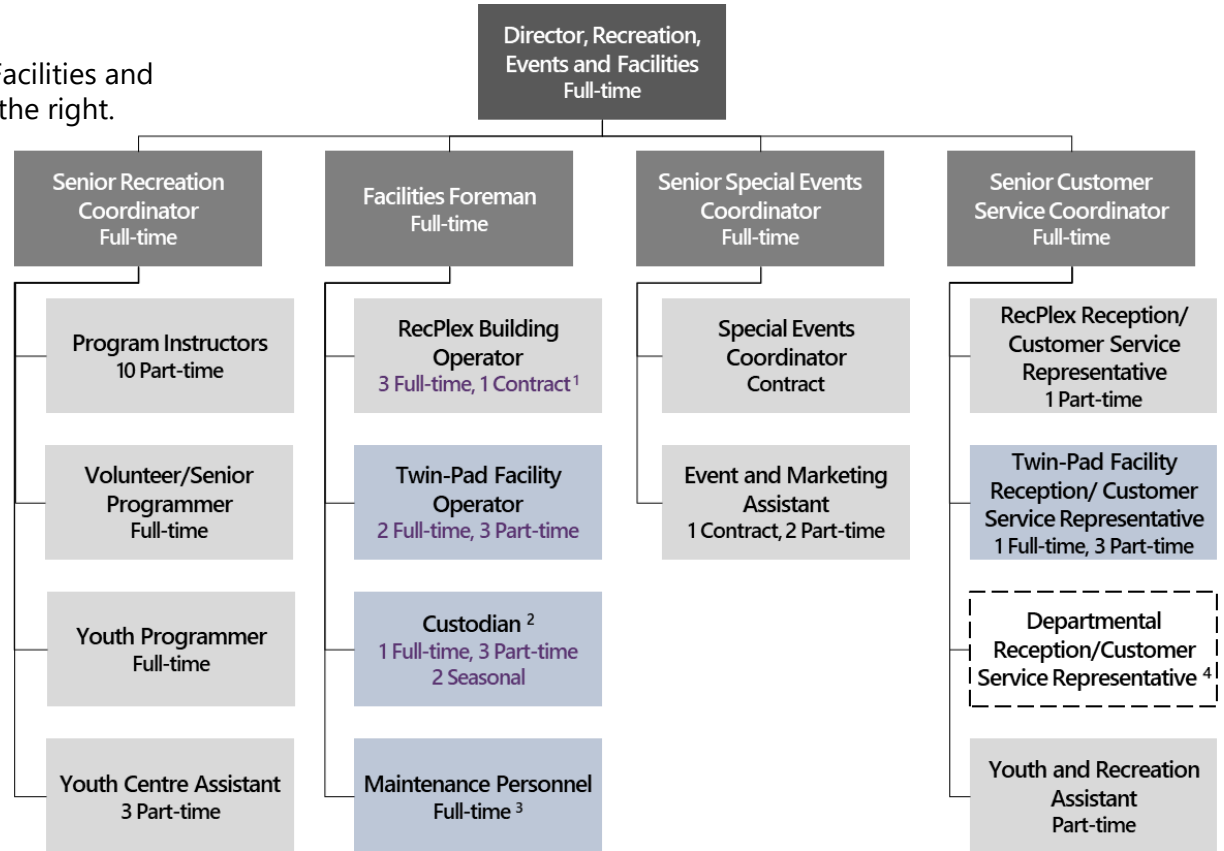
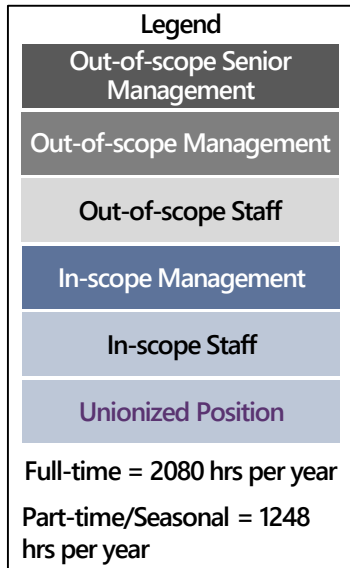
The information provided in this section has been validated by the Wasaga Beach Project Team through a series of workshops.

Recommendations – Facilities and Recreation Structural Design

Facilities and Recreation Divisions

A recommended structural design for the Facilities and Recreation Divisions has been provided to the right.

This design maintains the REF Department's current divisions. However, new positions have been added to accommodate the expected growth with the new facility.



¹This recommendation separates operations and maintenance as two distinct positions. A review of the RecPlex Building Operator position is required to determine if changes are required and if so, what the optimal number of staff is.

²An alternative option for the Custodian position would involve outsourcing some or all of the functions to a third-party provider.

³The Maintenance Personnel position would be responsible for facility maintenance across all the Department's facilities.

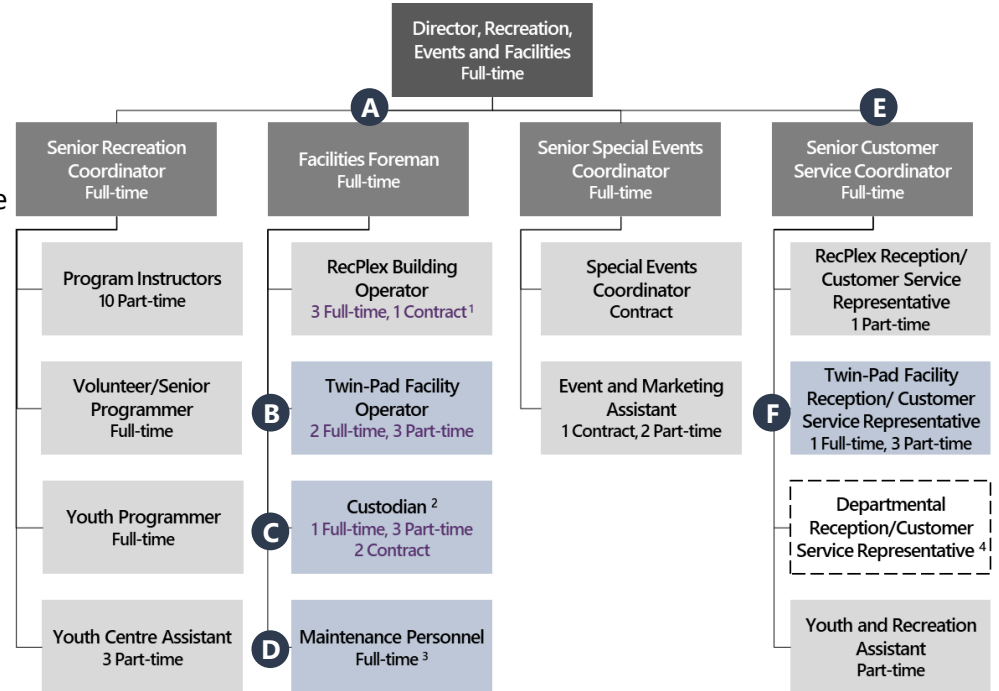
⁴This position represents the Customer Service Team that is accountable to the Senior Customer Service Coordinator, as outlined in the Customer Service Review recommendation, "7.A. Assemble a Customer Service Team with a Designated Customer Service Team Lead".

Note: Although part-time positions are not permitted under the current collective agreement, they have been included as there is an opportunity to include part-time positions in the upcoming negotiations.

Recommendations – Facilities and Recreation Structural Design

Facilities and Recreation Division – Key Features:

- A. Positions within the Facilities Division have been modified to fall under one of three distinct categories: 1) Operations, 2) Cleaning and Sanitizing and 3) Maintenance. This delineation of functions is required due to the increased size of the new facility.
- B. The Twin-Pad Facility Operator position is responsible for the day-to-day operations of the Twin-pad Arena and shared space, completing tasks such as cleaning, flooding and maintaining ice surfaces, monitoring arena equipment, assisting arena customers as required, setting up and taking down program equipment, etc.
- C. The Custodian position is responsible for the day-to-day cleaning and sanitizing of the arena and shared space, such as sweeping, washing floors, cleaning washrooms/change rooms, emptying garbage bins, etc. This position will also provide ad-hoc, “spot cleaning” to the library. *It is important to note that this option does not factor in additional cleaning and sanitizing that may be required by COVID-19 regulations. It is assumed that by 2023, a vaccine will be available that will mitigate any additional cleaning and sanitizing requirements.*
- D. The Maintenance Personnel position is responsible for the maintenance of all the Division’s facilities, focusing on preventative maintenance such as maintaining an inventory and up-to-date records of facility systems and equipment, inspecting and testing facility systems and equipment, conducting repairs when needed, etc.
- E. The “Senior Recreation Customer Service Coordinator” position has been renamed to align with the Customer Service Delivery Review recommendation, “1.A Assemble a Customer Service Team with a Designated Customer Service Team Lead” (pg. 50).
- F. The Twin-Pad Facility Reception/Customer Service Representative is responsible for greeting, assisting and providing services to customers in the facility’s lobby. Services include rental bookings, recreation registration, support for general inquiries, etc.



Recommendations – Facilities and Recreation Structural Design

Facilities and Recreation Division – In-scope Position Summary:

A summary of new positions has been provided below to identify the degree of change from the current state to the recommended future state. With the exception of “REF Department (All Staff)”, the table below only represents in-scope positions as highlighted on page 26.

Overall, the REF Department is increasing by one full-time position, nine part-time positions, and one contract position for staff assigned to the new facility.

	Current State			Future State			Net New		
	Full-time	Part-time	Contract	Full-time	Part-time	Contract	Full-time	Part-time	Contract
Breakdown of In-scope Positions by Divisions									
Facilities Division	4	0	1	4	6	2	0	+6	+1
Customer Service Division	0	0	0	1	3	0	+1	+3	0
REF Department (All Staff)	14	20	4	15	29	5	+1	+9	+1
Breakdown of In-scope Positions by Functions									
Arena Operations	4	0	1	2	3	0	-2	+3	-1
Customer Service	N/A ¹	0	N/A ¹	1	3	0	+1	+3	0
Facility Cleaning and Sanitizing	N/A ¹	N/A ¹	N/A ¹	1	3	2	+1	+3	+2
Facility Maintenance	N/A ¹	N/A ¹	N/A ¹	1 ²	0	0	+1 ²	0	0

¹Facility (Arena) customer service, cleaning, sanitizing, and maintenance are completed by Arena Personnel in the current state and therefore do not have separate staffing numbers.

²Facility maintenance in the new Twin-Pad Arena and Library facility requires less than one full-time staff, however, it is recommended that the Facilities Division employ a full-time position to service all of the Department’s facilities.

Recommendations – Facilities and Recreation Structural Design

Facilities and Recreation Division – Staffing Operating Costs:

A summary of the operating costs for future state in-scope positions in the Twin-pad Arena and Library has been summarized below. Operating costs are subject to change, as each position will require a new or updated job description, which then needs to be processed through the Town’s job evaluation system.

Position	Classification	Wage Band	Total Number of Staff (#)	Average Salary Per Year, Per Staff (\$) ¹	Cost of Benefits Per Year, Per Staff (\$) ²	Total Cost (\$) ³
Twin-Pad Facility Operator	Full-time	4	2	61,069	19,542	161,222
Twin-Pad Facility Operator	Part-time	2A	3	24,864	3,730	85,780
Custodian	Full-time	4	1	61,069	19,542	80,611
Custodian	Part-time /Seasonal	2A	5	24,864	3,730	142,967
Maintenance Personnel	Full-time	N/A	1	N/A	N/A	84,524 ⁴
Twin-Pad Facility Reception/Customer Service Representative	Full-time	4	1	61,069	19,542	80,611
Twin-Pad Facility Reception/Customer Service Representative	Part-time	2A	3	24,864	3,730	85,780
Total Cost for all Future State Staff in the New Facility (Year 1 – 2023)						721,495⁵
Total Staffing Operating Costs Year 1-5 (\$) ⁵	Year 1	Year 2	Year 3	Year 4	Year 5	
	721,495	738,811	756,542	774,699	793,292	

¹Average salaries are based on the 2019-2021 Three Year Phased-In Wage Grid and represents an average of all the steps in the particular wage band. The salaries have been adjusted to account for two years of cost of living adjustments (2.4% per year) based on a 5-year average provided by the Conference Board of Canada.

²Based on budgeted benefits of 15% for part-time and contract staff and 32% for full-time staff.

³Total cost represents the average salary per year plus the cost of benefits per year, multiplied by the total number of staff.

⁴Total cost was sourced from the “Arena Operating Forecast to 2031 Revision 4 GV” document. The total cost represents an average of the Building Maintenance Personnel 1, 2, and 3.

⁵It is assumed that salaries will increase by 2.4% each year to accommodate cost of living increases as per the 5-year average provided by the Conference Board of Canada.

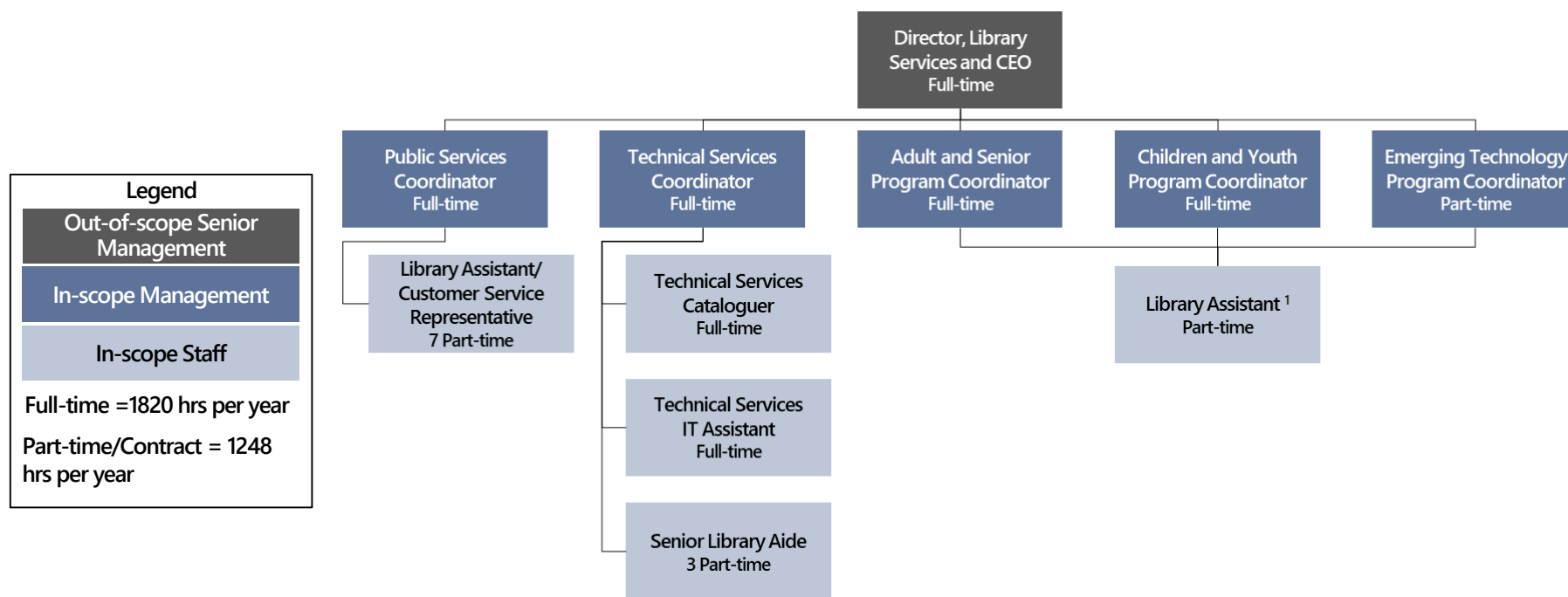
Note: The Department’s budget for the Arena in 2019 was \$417,871. It is forecasted to increase to \$631,622 in 2023 based on the Department’s own projections, however costs were calculated differently by MNP and therefore cannot be directly compared (e.g. the Facilities Foreman and Senior Customer Service Coordinator are out-of-scope position in MNP’s review).

Recommendations – Library Structural Design

Library Department

A recommended structural design for the Library Department has been provided below.

This design maintains the Library’s current departments. However, positions have either been re-allocated or added to accommodate the expected growth moving from the existing facility to the new facility.

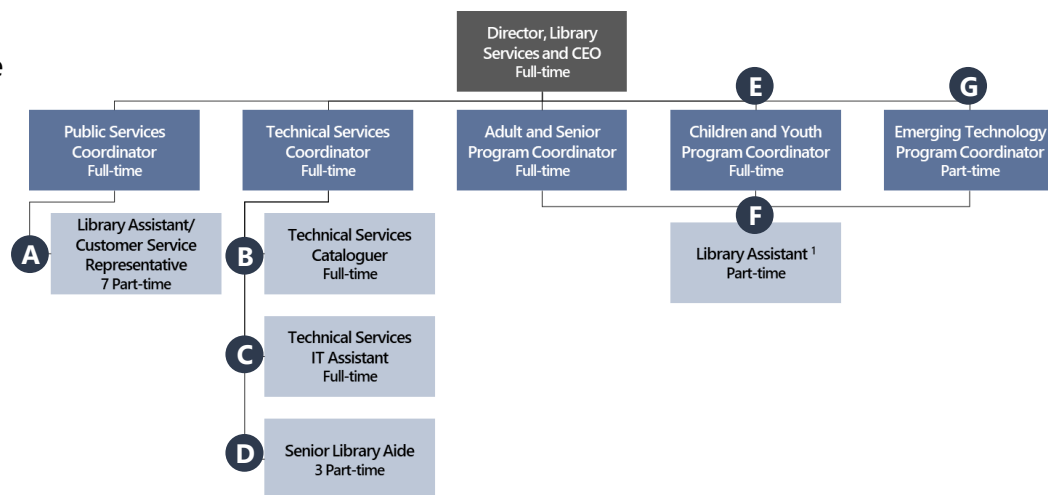


¹The Library Assistant reporting to the three program coordinators was identified as a half part-time position in MNP’s staffing model however, it is recommended that the Library employ a full part-time position (1,248 hours per year) to support the program coordinators and ensure appropriate coverage of assigned functions. Note: It will be important that the staffing structure be continually assessed to ensure the Library is able to optimally meet the needs and demands of customers. As the Library continues to grow, benchmarking of comparator municipal libraries is suggested.

Recommendations – Library Structural Design

Library Department – Key Features:

A. The Library Assistant/Customer Service Representative position is responsible for providing customer service and operating the circulation desk. This position would report to the Public Services Coordinator, however, it would also be accountable to the Customer Service Supervisor, as per the Customer Service Delivery Review recommendation, “1.A Assemble a Customer Service Team with a Designated Customer Service Team Lead” (pg. 51). This position is also a “floater”, responsible for providing additional support to Library staff and customers. Given the new facility’s size, it is expected that additional support will be required to manage increased programs, services and customers.



- B. The Technical Services Cataloguer position is responsible for processing the Library’s collection (i.e. creating and updating records in the Library’s catalogue).
- C. The Technical Services IT Assistant position is responsible for providing technical troubleshooting and support, as well as acting as a digital lab back-up when required.
- D. The Senior Library Aide position is responsible for supporting the maintenance of the Library’s collection, working closely with the Technical Services Cataloguer.
- E. The Children and Youth Program Coordinator position has been increased from a part-time position in the current state to a full-time position to accommodate the increased programming in the new facility.
- F. The Library Assistant position is responsible for supporting the three program coordinators, particularly with larger events.
- G. The Emerging Technology Program Coordinator is responsible for overseeing and running the digital and learning lab, which are new features in the new facility.

Note: it was identified in MNP’s current state findings (pg. 17) that a Community Engagement Specialist is a gap in the Library’s current staffing complement. Although a dedicated position has not been identified in this structural design, it should be noted that the Children and Youth Program Coordinator and Emerging Technology Program Coordinator will fulfill these functions. Future assessment should be conducted to determine if a dedicated position is optimal for the Library as it continues to grow.

Recommendations – Library Structural Design

Library Department – Position Summary:

A summary of new positions has been provided below to identify the degree of change from the current state to the recommended future state. The table below represents in-scope positions as highlighted on page 27.

Overall, the Library is increasing by three full-time positions, five part-time positions, and is reducing by four casual call-in positions. It is worthwhile to note that some of these increases represent positions transitioning from part-time to full-time, such as the Children and Youth Program Coordinator.

	Current State			Future State			Net New		
	Full-time	Part-time	Casual Call-in	Full-time	Part-time	Casual Call-in	Full-time	Part-time	Casual Call-in
Breakdown of In-scope Positions by Divisions									
Public Services	1	6	4	1	7	0	0	+1	-4
Technical Services	1	0	0	3	3	0	+2	+3	0
Program Services	1	1	0	2	2	0	+1	+1	0
Library Department (All In-scope Staff)	3	7	4	6	12	0	+3	+5	-4

Recommendations – Library Structural Design

Library Department – Staffing Operating Costs:

A summary of the operating costs for future state in-scope positions in the Twin-pad Arena and Library has been summarized below. Operating costs are subject to change, as each position will require a new or updated job description, which then needs to be processed through the Town’s job evaluation system.

Position	Classification	Wage Band	Total Number of Staff (#)	Average Salary Per Year, Per Staff (\$) ¹	Cost of Benefits Per Year, Per Staff (\$) ²	Total Cost (\$) ³
Public Services Coordinator	Full-time	6	1	68,248	21,840	90,088
Library Assistant/ Customer Service Representative	Part-time	3	8	31,805	4,771	292,604
Technical Services Coordinator	Full-time	6	1	68,248	21,840	90,088
Technical Services Cataloguer	Full-time	4	1	53,435	17,099	70,535
Technical Services IT Assistant	Full-time	4	1	53,435	17,099	70,535
Senior Library Aide	Part-time	1A	3	22,247	3,337	76,751
Adult and Senior Program Coordinator	Full-time	5	1	57,871	18,519	76,389
Children and Youth Program Coordinator	Full-time	6	1	68,248	21,840	90,088
Emerging Technology Program Coordinator	Part-time	4	1	36,641	11,725	48,367
Total Cost for all Future State Staff in the New Facility (Year 1 – 2023)						905,445⁴

¹Average salaries are based on the 2019-2021 Three Year Phased-In Wage Grid and represents an average of all the steps in the particular wage band. The salaries have been adjusted to account for two years of cost of living adjustments (2.4% per year) based on a 5-year average provided by the Conference Board of Canada.

²Based on budgeted benefits of 15% for part-time and contract staff and 32% for full-time staff.

³Total cost represents the average salary per year plus the cost of benefits per year, multiplied by the total number of staff.

⁴It is assumed that salaries will increase by 2.4% each year to accommodate cost of living increases as per the 5-year average provided by the Conference Board of Canada.

Note: The Library’s staffing budget for 2019 was \$682,670. It is forecasted to increase to \$1,023,336 (including the Director’s salary) in 2023 based on the Library’s own projections, however costs were calculated differently by MNP and therefore cannot be directly compared.

Recommendations – Library Structural Design

Library Department – Staffing Operating Costs continued:

Total Staffing Operating Costs Year 1-5 (\$) ⁴	Year 1	Year 2	Year 3	Year 4	Year 5
	905,445	927,176	949,428	972,214	995,547

⁴It is assumed that salaries will increase by 2.4% each year to accommodate cost of living increases as per the 5-year average provided by the Conference Board of Canada. Note: This projection does not factor in the expected growth of the Library's services and customers as this is not a quantifiable number that can be incorporated into the staffing model. It will be important that the staffing structure be continually assessed to ensure the Library is able to optimally meet the needs and demands of customers. As the Library continues to grow, benchmarking of comparator municipal libraries is suggested.

Recommendations – Additional Considerations

In addition to the recommended structural options, several additional recommendations have been provided below for the Town to consider as it continues the process of planning and implementing the new facility and more broadly, as it continues to grow and expand its programs and services.

1. Establish a Twin-pad Arena and Library Committee for the new facility to ensure ongoing communication and collaboration.

Description

The REF Department and Library have begun the process of planning their co-location in the new facility (e.g. determining the hours of operation), however, additional decision making is required. It is recommended that the REF Department and Library create a Twin-pad Arena and Library Committee to ensure ongoing communication and collaboration not only throughout the planning phase of the new facility but also the implementation and operational phase. This committee would be responsible for ensuring both parties regularly meet to discuss program and service offerings to avoid areas of overlap and identify collaborative opportunities, shared resource opportunities, and even opportunities for joint purchasing to achieve economies of scale.

The Twin-pad Arena and Library Committee should be comprised of staff from the REF Department and Library and should consult with individuals from various departments such as HR to ensure any potential employee relationship issues or risks are mitigated.

Role	Members	Functions
Executive Sponsors		Executive Sponsorship Decision Making
Team Leads		Decision Making Deliverable Approval Performance Management Project Management Risk Management Financial Management Project Communications
Advisory Members		Planning and Implementation Support Deliverable Development

Recommendations – Additional Considerations

2. Continue to assess opportunities to utilize shared resources, part-time/casual staff, volunteers, and partnerships.

Description
<p>It is recommended that the Twin-pad Arena and Library Committee continue to identify and assess opportunities to maintain a lean organizational structure using shared resources, part-time/casual staff, volunteers, and partnerships. As identified in the recommended structural option for the Facilities and Recreation Divisions, the Town may consider outsourcing all or part of the facility cleaning and sanitizing function. Based on the staffing operating costs of \$194,918 per year for the Custodian positions, the Town should issue a request for tenders to determine whether an in-house or outsourced custodial staff is the more economical option. In addition, the Town should also issue a request for tenders for the canteen and tuck shop in order to identify the most economical option.</p> <p>More broadly, it is recommended that the Town seek out additional opportunities to maintain a lean organizational structure, such as the use of volunteers for special/large events or partnerships with local businesses/organizations to run events and programs at a reduced cost.</p>

Recommendations – Additional Considerations

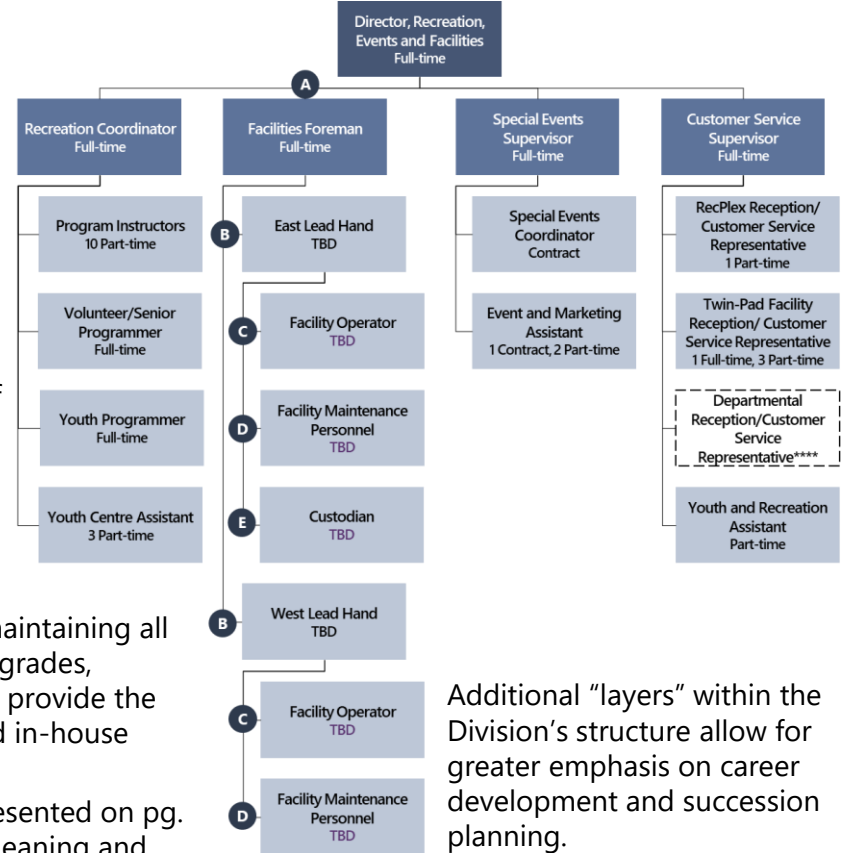
3. Consider further delineating functions within the Facilities Division to support the Town’s Asset Management Strategy and focus on career development and succession planning.

Description

To align with the Town’s Asset Management Strategy, which emphasizes the importance of proactive and preventative building maintenance and in-house technical skills, an additional structural option¹ has been developed for the Town’s longer-term considerations.

Key Features:

- A. The Facilities Foreman oversees the operations, maintenance, and custodial functions for the Town’s facilities.
- B. Two Lead Hand positions report to the Facilities Foreman that have been delineated between east and west facilities. The Lead Hand position is responsible for the day-to-day management of the Town’s facilities and the Division’s staff.
- C. The Facility Operator position is responsible for the day-to-day operations of the Town’s facilities (e.g. the Twin-Pad Arena, RexPlex, etc.), completing tasks such as assisting customers, setting up and taking down program equipment, etc.
- D. The Facility Maintenance Personnel position is responsible for maintaining all of the REF Department’s facilities, which includes repairs and upgrades, inspections, testing, and ongoing reporting. This position would provide the Town with proactive and preventative building maintenance and in-house technical skills.
- E. Expanding the Custodian position from the structural option presented on pg. 26, this position would now be responsible for the day-to-day cleaning and sanitizing of all the REF Department’s facilities, including sweeping, washing floors, cleaning washrooms/change rooms, emptying garbage bins, etc.



¹This is a conceptual option that requires further review and assessment before a finalized structure and operating budget can be developed.

Chapter Two: Customer Service Delivery Review

2.1. Customer Service Delivery Review Current State

This section summarizes the key findings as it relates to customer service delivery. The following five municipal sites with customer service counters were reviewed:

- Fire Counter Service;
- Town Hall Counter Service;
- Library Counter Service;
- RecPlex Counter Service; and
- Public Works Counter Service.

This overview is derived from the research methods described on slide 6 and served as input for recommendations of the ideal future state.

High-level Overview of Wasaga Beach Counter Services

The Town identified **five municipal counter service sites** to review for this project: Town Hall, the Library, the RecPlex, Public Works, and the Fire Hall. Although these five locations have customer-facing counters, an element of customer service exists at every municipal-owned facility for each employee that interacts with the public. Profiles for each municipal site were developed which detail the location, hours of operation, services provided, technology used, and key observations. These service profiles can be found in **Appendix F**.

The map below illustrates the elongated geography of the Town and displays how the five counter service sites are dispersed throughout the area. The geography of municipal sites is key challenge for the Town as customers are often required to travel to multiple counters to address the same interaction since all counters do not have the ability to offer all general services and payment solutions.



Counter Services offered at each Municipal Site

Customers are often required to travel to different site locations and/or counters for assistance. This can be very inconvenient for residents and reduces the effectiveness and efficiency of customer service delivery. As the table below demonstrates, each counter service site receives general and specialized service inquiries. There is **no central customer service phone line** that the public can contact for general inquiries and **the Town’s website can be challenging to navigate.** As a result, counter service representatives often spend a significant amount of time answering general questions and directing customers to the proper department or location because **general customer services and debit/credit payments are not available at each municipal site.**

Counter Services	Municipal Service Sites						
	Town Hall: Treasury	Town Hall: Building and Planning	Town Hall: Bylaw	Library	RecPlex	Public Works	Fire Hall
General Municipal Service Inquiries (e.g. hours of operation, service location)	✓	✓	✓	✓	✓	✓	✓
Specialized Municipal Service Inquiries (e.g. permits, applications)	✓	✓	✓		✓	✓	✓
Debit/Credit Departmental Service Payments (e.g. permits)	✓	✓	✓	✓	✓		
Tax and Water Payments	✓						
Cash/Cheque Departmental Service Payments (e.g. permits)	✓	✓	✓	✓	✓	✓	✓
Tax and Water Payments	✓						
Specialized Departmental Services (e.g. permits, applications)	✓	✓	✓		✓	✓	✓
General Customer Services:							
Departmental Service Coordination (e.g. Site visit Scheduling)		✓	✓		✓	✓	✓
Parking Pass	✓		✓				
Transit Pass	✓			✓	✓		
Program Registration					✓		
Event Applications					✓		
Waste Management Bag Tags	✓					✓	
Dog Tags	✓						

Information Technology Systems Used at each Municipal Site

Throughout stakeholder interviews, it was noted that each department leads their IT system selection with support from the Information Technology (IT) Department. It was noted that **there is an opportunity for the Town of Wasaga Beach to enhance its digital strategy and mandate to centralize IT system selections for an organization-wide approach.** The table below demonstrates that the Town has several customer service point systems that are not integrated, which has an impact on information collection and sharing and reporting across the Town.

The process currently underway for implementing CityView is a great example that the Town is on the right track in terms of centralizing IT system selection,. However, due to COVID-19, it has been difficult to keep the project moving forward. Meetings have become more informal and lack a defined responsibility matrix for the inter-departmental staff participating in the planning. Greater clarity around participant’s roles, responsibilities, and accountabilities is required.

Information Technology Systems Used	Municipal Service Sites						
	Town Hall: Treasury	Town Hall: Building and Planning	Town Hall: Bylaw	Library	RecPlex	Public Works	Fire Hall
Diamond	✓						
MiLisa		✓	✓				
BlueBeam		✓					
GIS		✓					
Book King					✓		
Booking Application					✓		
Work Manager						✓	
Microsoft Outlook (for scheduling purposes)						✓	✓
FIREHOUSE							✓
Plymouth Rocket Eventkeeper				✓			
Google Calendar (for scheduling purposes)				✓			
SirsiDynix WorkFlows				✓			

Customer Service Delivery Review Key Findings

In addition to the service and technology findings outlined in the previous pages the following key findings also emerged.

Staff are Customer Service Oriented

Despite having disparate customer service point systems it was noted that counter service representatives are customer service oriented and provide effective service levels with their current systems and tools.

Manual, Paper-Driven Processes

A number of counter services are delivered through manual, paper-driven processes that do not enable efficient or effective tracking of customer interactions and/or service delivery. Paper-driven processes typically result in duplication of effort, missing or incorrect information, increased travel time to share information, and increased costs (e.g. printing, mail).

Lack of Formal Customer Service Standards

Although staff have informal customer service standards, such as replying to inquiries within 24 hours, it was noted that the Town does not currently have formal customer service standards or metrics to measure the efficiency and effectiveness of customer interactions.

Counter Services are not Designed with the Customer Experience in Mind

The Town's counter services could be redesigned with the customer experience in mind. Customers are often required to travel between municipal sites because general services and payments are not offered at all municipal sites. In addition it was noted that the website is not easy to navigate, in-person vs. online interactions are required for a number of services, online payment options involve a 2.5% surcharge for the customer, site hours of operations are considered restrictive, the phone tree is considered confusing and there are multiple municipal phone numbers.

Customer Service Training

Even though staff are customer service oriented, it was noted that formal customer service training has not been provided. This coupled with the informal customer service standards could impact the consistency and quality of customer services provided at each municipal site.

2.2. Opportunities Assessment

MNP identified initial opportunities in the Current State Assessment which were abandoned, consolidated, and added to, resulting in five final opportunities that were assessed and prioritized.

This section describes the methodology MNP used to assess and prioritize each opportunity, and summarizes the findings and feedback from the workshops with the Wasaga Beach Project Team as it relates to the customer service delivery review.

The information provided in this section has been validated by the Wasaga Beach Project Team through a 1.5 hour workshop and served as input for the future state recommendations, which are described in Chapter 2.4.

Opportunities Assessment Introduction

Eight initial customer service delivery opportunities were identified through MNP's Current State Assessment, which can be found in **Appendix G**. After discussions with the Wasaga Beach Project Team, MNP abandoned, consolidated, and added new opportunities, resulting in a total of five opportunities.

MNP ensured the opportunities assessed aligned to the Town's objectives for the Customer Service Delivery Review, which included:

- Integrating services to improve customer service delivery;
- Enhancing the use of technology to reduce costs and provide citizens with improved access to services without compromising the security of transactions; and,
- Increasing efficiencies with existing staff and resources.

To evaluate each opportunity MNP worked with the Wasaga Beach Project Team to define evaluation criteria that was used as a benchmark to determine if an opportunity would help the Town achieve its objectives. The **opportunities were assessed against the evaluation criteria and plotted on a matrix that defined the ease of implementation and impact for the Town**. The evaluation criteria and matrix provided a systematic and data-driven approach used to help prioritize the opportunities.

MNP facilitated a workshop with the Wasaga Beach Project Team to review and validate the assessment of the five opportunities.

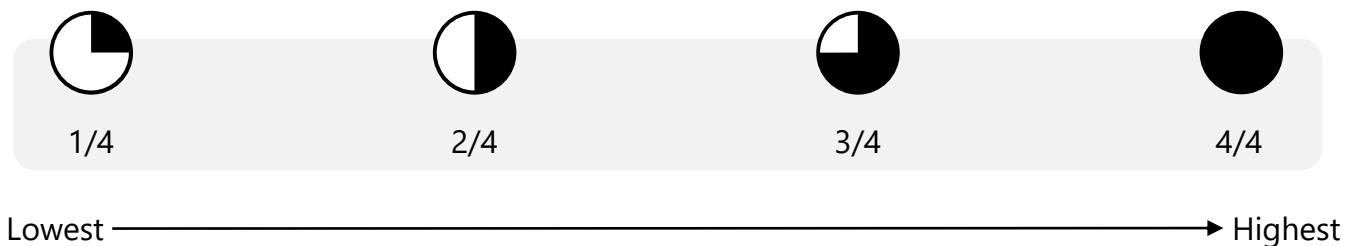


Opportunities Assessment Methodology: Evaluation Criteria

In consultation with the Wasaga Beach Project Team, the evaluation criteria listed below was developed, defined, and assigned a weighting percentage based on the agreed upon prioritization.

Evaluation Criteria	Description	Weighting
Improve customer service delivery	Improving customer service delivery is intended to enhance the customer experience when engaging with representatives from the Town's municipal counter service sites. This criterion addresses the Town's goal of integrating customer services across multiple sites.	45%
Increase the efficiency of customer service	Increasing the efficiency of customer service is intended to improve the internal processes that support customer service delivery so staff productivity may be maximized. A vital component of this criteria is the need to enhance administrative efficiencies through simplified processes.	35%
Reduce the total cost of counter services	Reducing the total cost of counter services considers the estimated value of cost savings that may be gained as a result of reduced time and resources. Please note this does not take into account any capital investments that may be required (IT) to find efficiency savings in the long-term.	20%

Each opportunity was evaluated against the evaluation criteria using Harvey circles to provide an initial rating. An in-depth description of the rationale for each opportunity's rating can be found in **Appendix G**. The ratings for each criteria are summarized in the graphic below.



Opportunities Assessment Methodology: 3x3 Matrix

MNP used a 3x3 opportunity assessment matrix to plot each opportunity in terms of the ease of implementation and the expected impact.

- **Ease of implementation** refers to how easy it may be for the Town to implement the opportunity, considering both the complexity and any investments (time and money) that may be required.
- **Impact** determines how beneficial an opportunity may be for the Town and the impact the opportunity could have on key pain points.

Each opportunity is scored based on low, medium, and high ratings for both the ease of implementation and impact.

	Low	Medium	High
Ease of Implementation	A complex project that would be difficult to implement because it may require extensive time, money and resources.	A project that would be somewhat difficult to implement because it may require some time, money, and resources.	A relatively easy project that would not be difficult to implement because it does not require significant time, money, or resources.
Impact	Would not provide the Town with impactful benefits, does not address key pain points, and/or would not help to achieve project objective.	Would provide some benefits to the Town, addresses some key pain points, and/or would somewhat achieve project objectives.	Would provide very impactful benefits to the Town that address key pain points and achieve the project objectives.

The results of the evaluation criteria scoring and the 3x3 matrix are described in the following sections.

Opportunities

The five opportunities listed below are the final list that were assessed against evaluation criteria and analyzed to determine the ease of implementation and impact. The assessment summary of each opportunity is described in the following slides and represents the outcome of MNP's opportunity assessment. To review the comprehensive assessment of each opportunity please refer to **Appendix G**. Each opportunity has been assigned a unique colour which will be consistent throughout the remainder of this report.

A

Provide standardized customer service.

B

Develop customer service standards to track and report on customer service performance.

C

Implement technology to integrate the Town's existing suite of software and technology.

D
















Improve online, self-service capabilities (e.g. online program registration and payment options) to reduce the volume of in-person counter interactions.

E

Enhance the digital roadmap and IT strategy for customer services to ensure an organizational-wide approach to customer service IT.

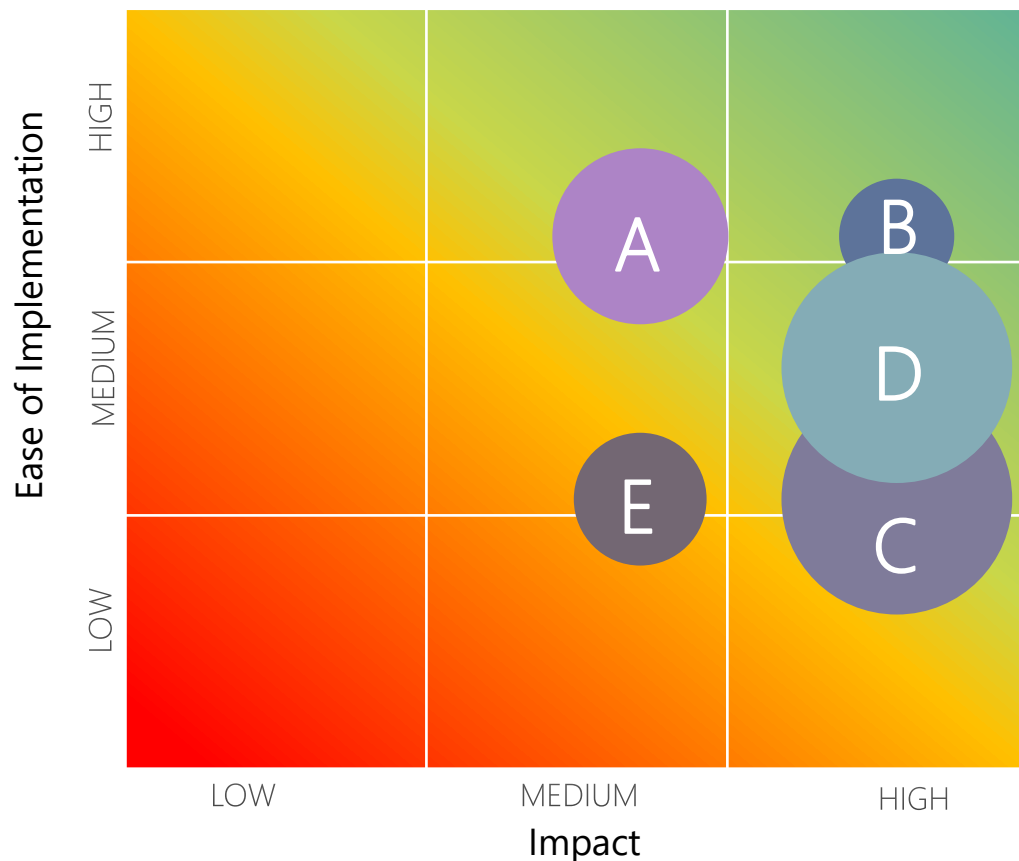
Opportunities Assessment Evaluation Criteria

Below is a summary of the assessment of opportunities against the evaluation criteria. To review the comprehensive assessment of each opportunity please refer to **Appendix G**.

Opportunities	Evaluation Criteria			
	Improve Customer Service Delivery	Increase the Efficiency of Customer Service Delivery	Reduce The Total Cost of Counter Services	Total Score
A Provide standardized customer service.	 4/4	 3/4	 1/4	3.05
B Develop customer service standards to track and report on customer service performance.	 2/4	 2/4	 2/4	2.00
C Implement technology to integrate the Town's existing suite of software and technology.	 4/4	 4/4	 4/4	4.00
D Improve online, self-service capabilities (e.g. online program registration and payment options) to reduce the volume of in-person counter interactions.	 4/4	 4/4	 4/4	4.00
E Enhance the digital roadmap and IT strategy for customer services to ensure an organizational-wide approach to customer service IT.	 1/4	 3/4	 4/4	2.30

Opportunities Assessment Matrix

Below is the 3x3 opportunity assessment matrix that illustrates the ease of implementation and impact for each opportunity. The size of each bubble is indicative of the opportunity's total weighted average score from the evaluation criteria assessment on the previous slide. Opportunities that have a larger bubble should be considered a higher priority as it indicates higher scores against the evaluation criteria. The green quadrants indicate an opportunity would be relatively easy to implement and would have a high impact to the Town. As opportunities move closer to the red quadrants, the level of impact decreases and implementation becomes more complex. To review the comprehensive assessment of each opportunity please refer to **Appendix G**.



Opportunity Legend:

- A. Provide standardized customer service.
- B. Develop customer service standards to track and report on customer service performance.
- C. Implement technology to integrate the Town's existing suite of software and technology
- D. Improve online, self-service capabilities (e.g. online program registration and payment options) to reduce the volume of in-person counter interactions.
- E. Enhance the digital roadmap and IT strategy for customer services to ensure an organizational-wide approach to customer service IT.

2.2. Customer Service Delivery Recommendations

This section summarizes MNP's recommendations as it relates to the customer service delivery review. The recommendations were developed based on all the information collected, MNP's analysis of opportunities, and incorporated feedback from the Wasaga Beach Project Team. The information provided in this section has been validated by the Wasaga Beach Project Team through a series of workshops.

Recommendations

MNP identified three overarching recommendations that were derived from the five opportunities and based on the prioritization that was determined from the opportunities assessment matrix. The overarching recommendations are identified as key areas of focus for the Town, which have three to four specific recommendations described in full detail in the following sections.

1. Improve and Standardize Customer Service

- A. Assemble a Customer Service Team with a Designated Customer Service Team Lead.
- B. Standardize service and payment solution offerings at each counter service site.
- C. Define the desired customer service experience and standards.
- D. Develop customer service training.

2. Integrate the Town's existing suite of software and technology

- A. Inventory existing IT systems to determine the risks associated with disparate systems.
- B. Implement a Robotic Process Automation (RPA) tool to augment and integrate the existing legacy systems without replacing them.
- C. Simplify architecture of payment services to improve payment solution offerings.

3. Improve Customer Service Technology

- A. Establish an IT Steering Committee that is responsible for executing all IT related decisions.
- B. Improve online, self-service capabilities (e.g. online program registration and payment options) to reduce the volume of in-person counter interactions.
- C. Implement a customer relationship management (CRM) system to track customer interactions, to centralize data collection and information sharing, automate reporting, and automate the management of customer service standards.

1. Improve and Standardize Customer Service

1.A. Assemble a Customer Service Team with a Designated Customer Service Team Lead.

Description

When it comes to customer service, customers expect consistent and reliable service regardless of the municipal site they visit. It was identified that the customer experience may vary across municipal sites because, as a function, customer service is not managed by one person or group and therefore it has never been standardized. To increase standardization and to improve the customer experience, it is recommended that the Town assemble a Customer Service Team with a designated Customer Service Team Lead to ensure there is centralized accountability for the customer service function.

The Customer Service Team Lead would report directly to the Director of the REF department and would be responsible for defining the future of the Town's customer service, for coordinating a standardized customer service approach across all departments, for providing customer service training, and for managing day-to-day customer service accountabilities.

The Customer Service Team would act as a customer service centre of excellence and would be responsible for proving frontline customer service and for contributing to future customer service improvement projects. While customer service, as a function, would be centrally managed by the Customer Service Team Lead, the Customer Service Representatives would maintain their current reporting structures; meaning customer service representative performance would still be managed by their respective department managers. A centralized customer service department is not feasible for the Town because each counter is highly specialized and customer service is only one aspect of a Customer Service Representative's role. To ensure this model is a success, it is recommended that the Town consider reviewing existing job descriptions to make sure customer service responsibilities, as it relates to the Customer Service Team, are specifically outlined. This approach to customer service would help to enhance both internal and external communications, internal knowledge transfer and information sharing, standardization, and consistency in terms of the customer experience. The diagram below describes the recommended governance structure for the Customer Service Team.

Role	Members	Functions
Sponsor	Director, REF Department	Executive sponsorship and overall accountability for the customer service team's performance.
Team Lead	Recreation Customer Service Supervisor	Performance management, leadership support, project management, risk management, and communications.
Customer Service Representative	Customer Service Representatives from Public Works, Planning, Building, Bylaw, Treasury, Library, RecPlex, and the Fire Hall	Day-to-day customer service support and continuous improvement.

1. Improve and Standardize Customer Service

1.B. Standardize service and payment solution offerings at each counter service site.

Description

As described with recommendation 1.A., the Current State Assessment highlighted that there is an opportunity to enhance standardization and consistency in terms of the customer experience. Currently, customers must visit specific counters to access specific services and they typically must travel between municipal sites to complete different steps for the same transaction. This is primarily because each site offers different services and most sites are not able to accept payment for services. To improve the customer service experience it is recommended that the Town consider standardizing the services and payment solutions offered at each site to support the expansion of full service counters.

The Town should identify the services that could be standardized across all counter sites and should look for the services that are not department specific, do not require access to individual's personal information, and would not require extensive training to implement. The following are examples of general services that are recommended for the Town to standardize:

- Departmental Service Coordination (e.g. Site visit Scheduling);
- Parking Pass;
- Transit Pass;
- Program Registration;
- Event Applications;
- Waste Management Bag Tags; and/or,
- Dog Tags.

The town should provide each counter with a virtual terminal and a mobile pin-pad to enable customer service representatives to accept payments for their department and all general services. It is recommended that water and tax payment services should not be offered at all counters because it requires the customer service representative to have access to sensitive personal and financial information. These services should remain with Treasury to comply with the privacy restrictions.

The implementation of this recommendation is highly dependent on the recommendations that are identified in the Dependencies section below.

Dependencies

- Recommendation 1.D. – In order to support a successful implementation, the Town needs to provide training to ensure staff know how to achieve the desired experience and standards, and to maintain consistency across the organization.
- Recommendation 2.B. – To standardize services and payment solutions, legacy systems must be integrated to centralize data collection and information sharing.
- Recommendation 2.C. – standardizing payment solution offerings would require a simplified payment architecture to support pin-pad payment machines at each counter.

1. Improve and Standardize Customer Service

1.C. Define the desired customer service experience and standards.

Description

The Town's counter services were not initially designed with the overall customer experience in mind as customers are often required to travel between municipal sites because general customer services and payment options are not offered at all locations. In addition, the website is not easy to navigate, online service capabilities are limited, site hours of operations are considered restrictive, the phone tree is considered confusing, and there are multiple municipal phone numbers. In order to improve customer service, it is recommended that the Town first define its desired customer service experience and then define the service standards to support the overall desired experience.

1. Define the Desired Customer Service Experience

It is important to define the desired customer service experience to ensure that the customer service representatives understand and are aware of what is expected of them. To do this, the Town should engage the public to gain an understanding of what customers want and expect when it comes to customer service.

2. Define Service Standards

Once the desired customer experience is defined, the Town should focus on developing two types of service standards:

- i. *Service Process Standards* to identify the customer transactions within internal processes so service delivery standardization and consistency may be achieved (e.g. speed, accuracy, efficiency, etc.). These standards also help to establish a clear understanding of what staff are required to do.
- ii. *Customer Experience Standards* to focus on generating positive experiences with customers and to define what the Town wants customer service to look like or feel like (e.g. customers leave counters with a smile, customers feel they are valued and important, etc.).

It is recommended that the Customer Service Team, discussed in recommendation 1.A., be tasked with defining both the desired customer experience and the service standards.

Dependencies

- Recommendation 1.A. – the Customer Service Team should be responsible for working with the public to define the desired customer service experience and standards, and should be responsible for reporting against those standards.
- Recommendation 2.B. and 3.C. – tracking and reporting on performance is dependent on centralized data collection and information sharing to avoid manual, paper-based processes that are typically associated with collecting data and generating reports.

1. Improve and Standardize Customer Service

1.D. Develop customer service training.

Description

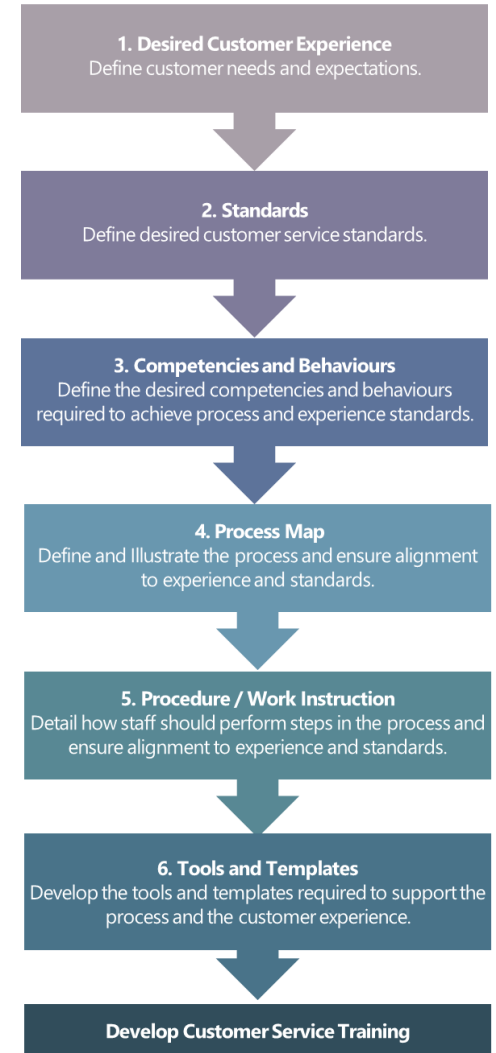
Even though Town staff are customer service oriented, it was noted that formal customer service training has not been provided. To support the desired customer experience and service standards, as detailed in recommendation 1.C., it is recommended that the Town develop customer service training for all customer-facing staff to ensure service delivery is consistent across Town.

The visual on the right highlights the required steps to develop customer service training. The first two steps align to recommendation 1.C. Once completed, the Town should define the competencies and behaviours (i.e. conflict resolution, patience) that staff should have to support the customer experience and service standards. With the first three steps complete, the Town should define and map its internal processes using swim lane diagrams to illustrate, at a high-level, who is responsible for each activity in the process (e.g. reviewing applications, communication, etc.). To complete this, the Town should document the current state in order to determine where efficiencies may be found (i.e. unnecessary activities), how the customer experience should be factored in, and where customer transactions should take place. The future state process maps should also take into consideration the dependencies highlighted below because technology could play a large role in reshaping staff work. Once the process maps are completed, formal procedures and work instructions should be completed to document how staff should perform steps in the process. These documents serve as training documents to help staff understand what is required. The final step is for the Town to develop the tools and templates, such as training manuals, fillable forms, etc. to support staff when performing the process. Steps one through six are all key inputs required to develop customer service training that may be delivered on an annual basis or leveraged for new staff onboarding.

Dependencies

- Recommendation 1.A. – implementation is dependent on the Customer Service Team overseeing this work.
- Recommendation 1.C. – implementation is dependent on defining the desired customer service experience and standards developed by the Customer Service Team.

Steps to Develop Customer Service Training



2. Integrate the Town's Existing Suite of Software and Technology

2.A. Inventory existing IT systems to determine the risks associated with disparate systems.

Description

Rapid technological innovation is a key trend impacting municipalities across Ontario. As technology continues to expand into everyday business processes, organizations are becoming more dependent on their suite of IT systems to support efficient and effective service delivery. It was identified that each Town department uses different customer service IT systems that are not currently capable of integrating. The lack of integration impacts data collection and information sharing, and the number of systems could ultimately put the Town at risk when it comes to information security.

It is recommended that the Town conduct an IT infrastructure review to take inventory of its existing software and technologies to determine the risks associated in operating with disparate systems. Reviewing the Town's IT systems would help to identify what is compatible, what is working well or not working well, where the ownership of each system belongs, and could identify specific opportunities to integrate or consolidate the current technology suite.

The Town could perform this recommendation in-house if current capacity and capabilities exist or it could be done by a third-party IT consultant who could perform an objective assessment of the technology.

Dependencies

- Recommendation 3.A. – To ensure the benefits of implementation are maximized, this activity should occur once the IT Steering Committee is assembled and before the IT strategy and digital roadmap is developed. This will provide valuable insights about the Town's IT infrastructure, to support the development of an IT strategy and digital roadmap.

2. Integrate the Town's Existing Suite of Software and Technology

2.B. Implement a Robotic Process Automation (RPA) tool to augment and integrate the existing legacy systems without replacing them.

Description

As described the Town has disparate systems that do not allow for direct integration. The lack of integration ultimately impacts data collection and information sharing, increases manual, paper-driven processes, and impedes the Town from expanding service offerings across municipal sites. To augment and integrate the existing legacy systems without replacing them, it is recommended that the Town implement an RPA tool.

RPA is a system that can behave as an automated agent, capable of interacting with and performing human-like actions on any application in a standard personal computer (e.g. opening files, inputting data, copy and pasting fields, etc.). It could be used to integrate data that would otherwise be trapped in each system by simulating human actions of opening files and copying and pasting data between IT systems. Implementing an RPA tool is relatively inexpensive and is necessary for the Town to achieve its vision of expanding service offerings as it would integrate the Town's disparate IT systems without replacing them. The goal should be to centralize data collection and information sharing, reducing duplicate entry, and would automate manual, paper-driven processes.

The Town could facilitate the software provider selection process and scope of processes considered for implementation of the RPA tool internally, if IT has the capacity and capabilities. It is recommended that the Town engage a third-party consultant, who specializes in technology projects, in to implement the RPA tool as it will require a specialized skillset and dedicated resources that have prior RPA implementation experience. To implement an RPA tool, the Town would be required to expand on the work outlined in recommendation 2.A., and to develop a process map to define the steps required to perform each activity. Each manual interaction identified represents an opportunity to implement an RPA function specific for that task. The inventory of all manual interactions between systems will form the requirements to be used as the implementation scope for the development of an RPA agent that can automate those interactions. The specific types of manual interactions the Town should identify for automation opportunities include, but are not limited to:

- Accessing and gathering data from several different applications to complete activities;
- Moving data from one system to another;
- Checking the consistency of data between multiple systems;
- Updating the same information in multiple systems;
- Waiting for alerts/events to initiate activities; and,
- Remediating data across several records.

Dependencies

- Recommendation 2.A. – The output from reviewing current IT systems would help to identify opportunities to implement RPA
- Recommendation 3.A. – Software selection and implementation should be conducted after recommendation 3.A. is implemented.

2. Integrate the Town's Existing Suite of Software and Technology

2.C. Simplify architecture of payment services to improve payment solution offerings.

Description

The Town currently uses multiple payment solution providers including, TD pin-pad, Cale, GTechna, PlastiQ, and is considering the implementation of Moneris and/or Paymentus¹. The Town has been unable to use one payment solution across the organization and to implement payment solutions at all municipal counter service sites given current compatibility issues between software providers and pin-pad/payment providers (e.g. BookKing requires the use of Moneris as the payment provider, but Moneris does not offer pin-pad options)¹. This creates a complex architecture of payment services for the Town and poses challenges including:

- Management of multiple vendor contracts and relationships;
- Lost opportunities for volume pricing discounts;
- Time consuming, manual processes for employees to reconcile transactions; and,
- Inconsistency in data collection and reporting as each payment provider has a different format for sharing information.

It is recommended that the Town simplify the architecture of payment services by reducing the number of point-solutions. All transactions should be consolidated and centralized into a single platform (i.e. support virtual terminals, pin pads, and online payment processing under a single platform). Simplifying the architecture of payment services would improve the efficiency and effectiveness of customer service delivery by addressing many of the challenges listed above.

Implementing this recommendation is complex and requires multiple groups within the organization to be involved to ensure that the correct IT tools are in place, that financial controls are maintained, and that there is effective training in place to support staff in performing the new processes. While Treasury is responsible for the overall receipt of payments, the actual software selection of payment solutions (and applications that require integration with payment solutions) should fall under the responsibility of the IT Steering Committee. The simplification of payment architecture should be a guiding principal for the IT Steering Committee and should be a key consideration when developing the digital roadmap and IT strategy. This project could be performed internally if capabilities and capacity exists, however, a third-party consultant could also facilitate the implementation of this recommendation.

Dependencies

- Recommendation 1.D. – the Town should incorporate the new payment processes into customer service training to ensure staff know how to provide these services while maintaining the proper financial controls.
- Recommendation 2.B. – the success of simplifying the architecture of payment services is highly dependent on the implementation of an RPA tool to automate and integrate the existing IT systems. If this does not occur, manual processes would be required to facilitate financial controls of payments processing for those systems that do not directly integrate.

¹Payment solution information provided by the Treasurer in the report "Overview Online Payment Options"

3. Improve Customer Service Technology

3.A. Establish an IT Steering Committee that is responsible for executing all IT related decisions.

Description

Technology, when used effectively, can enhance business operations by providing valuable data insights, streamlining processes, and integrating tools to service the needs of customers. Rapid technological innovation and constrained budgets are two key trends impacting municipalities across Ontario. With these trends in mind, the Town has the opportunity to leverage IT as a strategic component of the organization by establishing an IT Steering Committee. This group would be responsible for executing all IT related decisions and would be responsible for enhancing, implementing, and regularly updating the digital roadmap and IT strategy for customer services. This would provide a systematic approach to prioritizing and coordinating upcoming technology projects to minimize the amount of resources and funding required, while maximizing the benefits for all departments by improving customer service technology and customer service delivery.

The IT Steering Committee should be comprised of at least one IT representative and one Director from each department to support an organization-wide approach to IT. The IT Steering Committee could also consult with individuals from various departments at an operational level to make sure IT is efficient and effective. Please see the following slide to view the recommended governance structure for the IT Steering Committee. To support the committee, guiding principles for how the team will operate should be defined. Examples of guiding principles that are the Town use include:

- Taking a systematic approach new technology selection and implementation;
- Detailing the processes for planning, selecting, and implementing new technology solutions;
- Focusing on phasing out single-purpose applications;
- Simplifying payment architecture;
- Identifying software that provides a wider scope of features to reduce the number of systems; and,
- Defining a preference for a vendor or technology type (e.g. preference for systems that integrate well with Microsoft Office and Windows).

To support any future IT implementations, the IT Steering Committee should ensure change management activities are considered and defined in the digital roadmap and IT strategy.

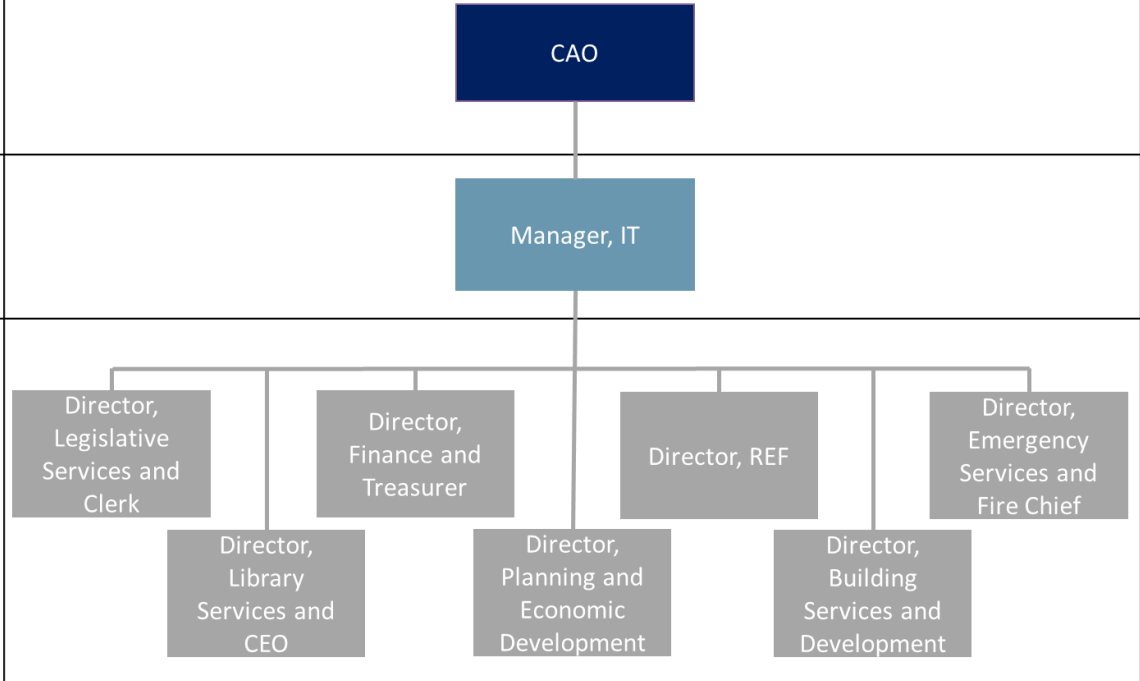
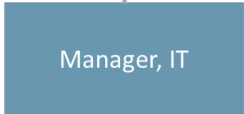
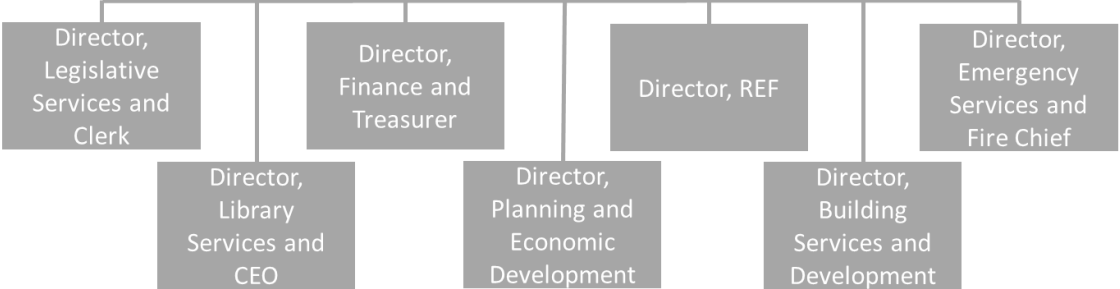
Dependencies

- Recommendation 2.A. – The information gathered from inventorying the Town’s IT systems should provide insights that would support the development of a digital roadmap and IT strategy.

3. Improve Customer Service Technology

3.A. Establish an IT Steering Committee that is responsible for executing all IT related decisions.

The following diagram describes the recommended governance structure for the IT Steering Committee*.

Role	Members	Functions
Sponsor		Executive sponsorship and overall accountability for the committee's projects and decisions.
Committee Lead		Technical expertise, project management, risk management, and communications.
Committee Members		Strategic direction and collective decision making.

*The Directors may delegate their authority or tasks to another individual within their department that has the skills and capabilities the IT committee needs to make strategic decisions.

3. Improve Customer Service Technology

3.B. Improve online, self-service capabilities (e.g. online program registration and payment options)

Description

It was identified in the Current State Assessment that online resources and services are challenging to navigate and that there is an opportunity to expand on these capabilities to enhance the customer experience by increasing the availability of online self-serve resources. Additionally, it was identified that younger families are moving to the Town of Wasaga Beach, which may mean they expect the Town to improve access to online services through their existing website. For example, residents may want to be provided with self-service options when it comes to accessing information, registering for programs, submitting e-applications, and/or paying for services. Improving the Town's online, self-service capabilities would reduce the volume of in-person interactions freeing up Customer Service Representatives and allowing them to focus on the quality of their in-person interactions.

The Town is currently updating their website and so has the opportunity to review and enhance its online service capabilities and to improve the overall customer experience by improving system navigation and access to information.

The Town should also consider reviewing and selecting any relevant CityView modules that may enable self-service capabilities such as the use of eForms solutions with workflow capabilities or the use of electronic document submissions for building and planning applications.

Dependencies

- Recommendation 3.A. – the success of this recommendation is dependent on the IT Steering Committee drive the improvements to online, self-service capabilities.

3. Improve Customer Service Technology

3.C. Implement a customer relationship management (CRM) system.

Description

CRM systems are used to support the collection, tracking, reporting, and management of customer-related data in a central system, designed to support the delivery of consistent customer experiences and a single view into a customer's history of interactions. A CRM could offer insights into the service quality being provided and could ensure that no matter where or when a customer interaction takes place, that the Town is able to provide full support and services.

It was identified that the Town would like to provide customers with a "one-stop shop" experience where they could go into any of the counters to register and pay for programs/services and have all of their inquiries answered. To do this, there is an opportunity to leverage a CRM system, that would provide the Town with a centralized knowledge base that customer service representatives at any municipal site could utilize to answer specific questions outside of their department expertise.

A CRM system would allow for an omni-channel approach to centralized information collection by gathering customer responses from multiple channels including, in person counter visits, phone calls, emails, and social media messages. This would provide customer service representatives with a central database of information about the customer and any interactions they have had with the Town to improve the efficiency and effectiveness of customer service delivery by tailoring each response to the situation.

Additionally, a CRM system would support automated reporting of data including, tracking the Town's performance against service standards, which coincides with recommendation 1.C.

To enable an effective omni-channel approach for standardized service delivery, it would be beneficial to transition to a centralized phone number with an automated operator to direct calls to the appropriate service site. Although a CRM system is not a necessary component for service delivery, it is a vital component to transform the Town as a customer-centric organization, providing first class customer experience. Since a CRM system is not a critical component to service delivery, a cost benefit analysis would need to be done to determine if there is a significant return on investment. Implementing a CRM system would be a large project, requiring significant resources (time and money). It is recommended that the Town engage a third party to support the software selection process and to facilitate the implementation.

Dependencies

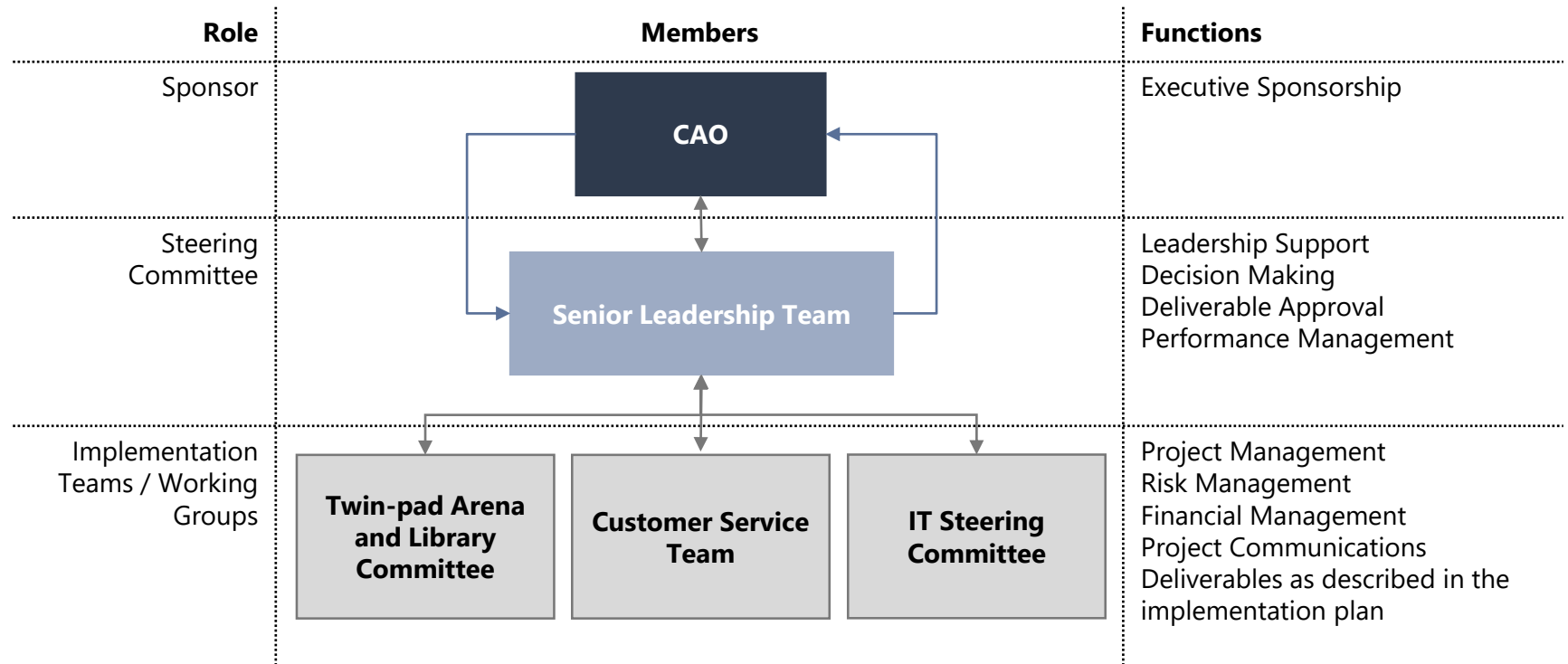
- Recommendation 1.C. – Although this is not a dependency, a CRM system would provide great insights to the Town's performance against customer service standards and would support the automation of data collection and reporting.

Chapter Three: Implementation Plan

MNP has developed a high-level implementation plan for both the Organizational Staffing Review and the Customer Service Delivery Review which can be found in this section. MNP has incorporated any dependencies that may affect the sequence of recommendations in the timeline.

Considerations Related to Project Governance

A strong and clear project governance is necessary to ensure that the project will have a successful outcome. The table below outlines the various project roles and responsible functions required to support the implementation of the recommendations. The arrows represent reporting paths, depicting a team that has open communication and strong collaboration.



Considerations Related to Assumptions and Risks

In the development of the implementation plan, the following assumptions were made:

- The recommended organizational designs are approved;
- Qualified candidates can be sourced to fill open positions; and
- Resources are available and made accountable to deploy the implementation plan activities;
- The Implementation Teams/Working Groups are established on schedule and the Senior Leadership Team is able to successfully develop an integrated project plan and manage the project effectively.

The overall success of Wasaga Beach's implementation can be affected by the following risks:

Risk	Mitigation
Employee resistance to change	Employ change management strategies to include employees in change activities and increase overall buy-in.
Shortfalls in resourcing	Plan resources in advance and gain approval from the Project Sponsor and Steering Committee.
Delays in critical milestones	The Implementation Teams/Working Groups will conduct regular check-ins with the Steering Committee to report on progress.
Pace of change	Monitor environmental changes (e.g. within government and customer service functions) and participate in discussions to influence direction of change.
Municipal pressures/ priorities	Monitor municipal priorities and participate in discussions to influence direction of change.

Implementation Plan Organizational Staffing Review

High level implementation plans of the recommendations described in Chapter 1 have been provided on the following pages. The implementation plans outline key activities and milestones/deliverables and take into consideration any interdependencies.

Recommendations and Activities	Timeline											
	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023		
1. Facilities and Recreation Structural Changes												
1.1 Continue to plan and confirm operational details of the new facility (e.g. program and service offerings, etc.)	█	█	█									
1.2 Confirm the recommended structural option				◆								
1.3 Develop job descriptions for all new and changed positions in the finalized structural option				█								
1.4 Evaluate new and changed positions using the Town's job evaluation system to determine appropriate classification and compensation					█							
1.5 Map existing positions to new and changed positions in the finalized structural option						█						
1.6 Communicate the finalized structural option to all staff							◆					
1.7 Develop updated policies and procedures based on the operational details of the new facility						█	█	█				
1.8 Based on the activity 1.5, post any remaining vacant positions for internal and/or external competition								█				
1.9 Recruit and select successful candidates									█			
1.10 Onboard and train successful candidates and existing candidates mapped to new and changed positions										█	█	
1.11 Go-live with the new structure in the new facility												◆
1.12 Monitor and make adjustments to new and changed policies, procedures, and positions as necessary												█

Implementation Plan Organizational Staffing Review

Recommendations and Activities	Timeline										
	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023	
2. Library Structural Changes											
2.1 Continue to plan and confirm operational details of the new facility (e.g. program and service offerings, etc.)	█	█									
2.2 Confirm the recommended structural option			◆								
2.3 Develop job descriptions for all new and changed positions in the finalized structural option			█								
2.4 Evaluate new and changed positions using the Town's job evaluation system to determine appropriate classification and compensation				█							
2.5 Map existing positions to new and changed positions in the finalized structural option					█						
2.6 Communicate the finalized structural option to all staff						◆					
2.7 Develop updated policies and procedures based on the operational details of the new facility						█	█				
2.8 Based on the activity 1.5, post any remaining vacant positions for internal and/or external competition							█				
2.9 Recruit and select successful candidates								█			
2.10 Onboard and train successful candidates and existing candidates mapped to new and changed positions									█	█	
2.11 Go-live with the new structure in the new facility											◆
2.12 Monitor and make adjustments to new and changed policies, procedures, and positions as necessary											█

Implementation Plan Organizational Staffing Review

Recommendations and Activities	Timeline											
	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023		
3. Establish a Twin-pad Arena and Library Committee												
3.1 Identify the Advisory Members of the Committee												
3.2 Confirm the roles and responsibilities (functions) of the Committee members												
3.3 Confirm the goals and desired outcomes of the Committee												
3.4 Conduct regular meetings to ensure ongoing communication and collaboration												...
4. Continue to Assess Opportunities to Utilize Shared Resources, Part-time/Casual Staff, Volunteers, and Partnerships												
4.1 Based on the confirmed operational details of the new facility, identify opportunities to maintain a lean organizational structure												
4.2 Assess the identified opportunities to reach a go/no-go decision												
4.3 Issue request for tenders for confirmed opportunities to identify the most effective and economical option												
4.4 Confirm the recommended structural option												
5. Consider Further Delineating Functions Within the Facilities Division to Support the Town's Asset Management Strategy and Focus on Career Development and Succession Planning												
5.1 Monitor the new structure in the new facility												...
5.2 Review the proposed conceptual option provided in MNP's additional considerations that further delineates the functions within the Facilities Division												...
5.3 Assess whether the proposed conceptual option would be an optimal model based on the first year of operations of the new facility												...
5.4 Conduct a formal organizational design process if a decision is made to move forward with the proposed conceptual option												...

Implementation Plan Customer Service Delivery Review

The timeline below describes a high level implementation plan of the recommendations that would be described in Chapter 2. MNP has taken into consideration the dependencies which are outlined in Chapter 2.2. which may impact the timeline of the plan.

Recommendations and Activities	Timeline											
	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023		
1. Improve and Standardize Customer Service												
1.A. Assemble a Customer Service Team with a Designated Customer Service Team Lead.												
1.A1. Identify the Customer Service Team members	◆											
1.A2. Confirm the roles and responsibilities (functions) of the team members												
1.A3. Confirm the goals and desired outcomes of the Team												
1.A4. Conduct regular meetings to ensure ongoing communication and collaboration												...
1.B. Standardize service and payment solution offerings at each counter service site.												
1.B1. Identify the services that could be standardized across all counter sites												
1.B2. Enable all counters to accept payments by providing virtual terminals and mobile pin-pads												
1.B3. Review and update formal documentation of the processes for each identified service												
1.B4. Ensure these processes are considered in customer service training												
1.C. Define the desired customer service experience and standards.												
1.C1. Work with the public to define the desired customer experience												
1.C2. Identify the desired service process standards												
1.C3. Identify the desired customer experience standards												
1.C4. Continuous tracking and reporting of performance against the standards												...
1.D. Develop Customer service training.												
1.D1. Define the desired competencies and behaviours to achieve process and experience standards												
1.D2. Define and illustrate the process map												
1.D3. Detail how staff should perform steps in the process to achieve the desired customer experience and standard												
1.D4. Develop tools and templates required to support the process and the customer experience												
1.D5. Develop customer service training												
1.D6. Deliver customer service training											◆	...

Implementation Plan Customer Service Delivery Review

Recommendations and Activities	Timeline									
	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023
2. Integrate the Town's Existing Suite of Software and Technology										
2.A. Inventory existing IT systems to determine the risks associated with disparate systems.										
2.A1. Determine whether there is capacity and capabilities in-house to conduct review										
2.A2. Detail specifics of each technology including: strengths, weaknesses, where the ownership belongs, identify what is compatible, opportunities to integrate/consolidate technologies, and identify any potential risks with the current IT architecture.										
2.B. Implement a Robotic Process Automation (RPA) tool to augment and integrate the existing legacy systems without replacing them.										
2.B1. Determine whether there is capacity and capabilities in-house to facilitate the software provider selection and implementation										
2.B2. Develop a process map to identify the manual processes that exist										
2.B3. Use the identified manual processes to determine the scope for development of an RPA agent and implement the RPA tool										
2.C. Simplify architecture of payment services to improve payment solution offerings.										
2.C1. Determine whether there is capacity and capabilities in-house to facilitate the simplification of payment architecture										
2.C2. Leverage the RPA tool to overcome compatibility challenges between software providers and pin-pad/payment providers										
3. Improve Customer Service Technology										
3.A. Establish an IT Steering Committee that is responsible for executing all IT related decisions.										
3.A1. Identify the Committee members										
3.A2. Confirm the roles and responsibilities (functions) of the team members										
3.A3. Develop the guiding principles for the Team and confirm the goals and desired outcomes										
3.A4. Develop a digital roadmap and IT strategy										
3.A5. Ensure ongoing communication and regular updates to the digital roadmap and IT strategy										
3.B. Improve online, self-service capabilities to reduce the volume of in-person counter interactions.										
3.B1. Review specifications of the new website to determine opportunities to enhance online service capabilities										
3.B2. Review and select any relevant CityView modules that may enable self-service capabilities										
3.C. Implement a CRM.										
3.C1. Conduct a cost-benefit analysis to determine whether the return on investment would be beneficial for the Town										
3.C2. If the prior step determines that it would be advantageous, Determine whether there is capacity and capabilities in-house to facilitate software provider selection and implementation										

An aerial photograph of a residential area. The left side of the image is darkened and semi-transparent, showing a residential area with a winding road and a large body of water. The right side is a clear, bright aerial view of a residential area with a river, a beach, and a large building complex. The word "Appendices" is written in white text on the darkened left side.

Appendices

Appendix A: Documents Reviewed

Documents Reviewed

- Admin Assistant Planning
- Administrative Assistant Building and Development Standards 2020
- Administration 2020
- Appendix A – Arena and Library – Chamber Site – Sources and Uses Nov 1 2019
- Appendix B – Estimated Arena Operating Cost Projection
- Appendix C – Estimated Library Operating Cost Projection
- Appendix D – ICIP Council Resolution letter
- Arena-Facility maintenance Job Description
- Beachfront 2020
- Bradford – 2019 Organizational Chart
- ByLaw AA Licensing Officer 2020
- Children and Youth Program Coordinator 2020
- Clerk’s Department, Bylaw 2020
- Collingwood Public Library Organization Chart JL 2019
- Copy of Copy of Staffing Projections – 10-10-2019 (Library)
- Customer Service Coordinator
- Customer Service Representative
- CUPE Collective Agreement Exp Dec 31 2020
- Department of Recreation Events and Facilities
- Director of Library Services & CEO 2020
- Economic Development and Tourism, Planning and Building 2020
- Facilities Foreman
- FF 2015-2018 Collective Agreement (Final 11FEB19)
- Final – WBPL Newsletter March April 2020 – as of 02-18-20
- Fire 2020
- Future Organizational Chart-Budgeted for 2022
- LA 1 – Adult and Senior Services Programmer
- LA 1 – Technical Services
- Library Assistant 1 – Job Description 2019
- Library 2020
- LibraryOP – 2020 (2)
- Midland Public Library Organization Chart 2019
- Older Adult and Volunteer Programmer 2020
- Operating Statement 2019
- PT REF CSR – 2020
- Public Works 2020
- Recreation, Events, and Facilities 2020
- Recreation and Youth Coordinator – 2020
- Recreation Youth Assistant
- REF Budget
- Schedules
- Senior Aide – Casual call-in 2020
- Staff Report 2020 Arena and Library Grant Application 11/05/19
- Stratford Public Library – Organization Chart 2019
- Treasury 2020
- WB Parks Spring 2-2- AODA F2
- WBPL Staffing – 2020-Organizational Chart
- WBPL – Strat Plan 2015-2020 Brochure-Oct 21v2

Appendix B: Stakeholder Participants

Stakeholder Participants

- **George Vadeboncouer**, CAO
- **Jocelyn Lee**, Treasurer
- **Denise Henry**, Manager of HR
- **Chris Roos**, Manager of REF
- **Pam Pal**, Manager of Library
- **Steve Weir**, Union President/Rep
- **Phil Eichler**, Facilities Foreman
- **Sherryl Chapman**, PW for Front Line
- **Carly Murdoch**, Bylaw Front Line
- **Dagmar De Rijke**, Planning Front Line
- **Maria DiPoce**, Building Front Line
- **Chief McWilliam and Deputy Craig Williams**, Fire (Filling in for Fire Front Line)
- **Iona Sinikivi**, Treasury Front Line
- **Jennifer Perks**, Coordinator of Public Services
- **Darlene Poole**, Customer Service Coordinator
- **Debbie Grant**, Board Chair
- **Brittany Pampalone**, Technical Services
- **Angela Kemp**, Adult/Senior Programs
- **Cathy Turrie**, Children's Programs
- **Josh Pallas**, Recreation Coordinator
- **Judith Illidge**, Adult and Volunteer Coordinator
- **Jeremy McNaught**, Youth Programmer

Appendix C: Organizational Staffing Review Current State Key Findings

Twin-pad Arena and Library Overview

An overview of the Town's new facility, the Twin-pad Arena and Library, is provided below. As one of Council's priorities, the new facility will act as a community hub offering several existing and new programs and services.

About the New Facility

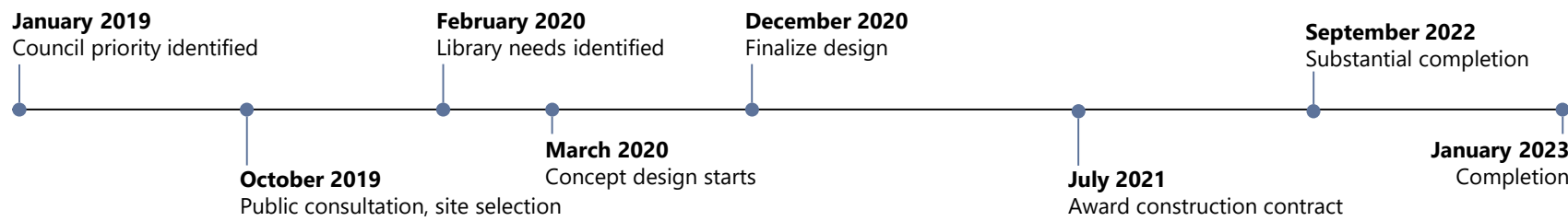
The construction of a new co-located Twin-pad Arena and Library was deemed a priority by Council to ensure the Town continues to provide high-quality customer-focused programs and services and continues to meet the increasing needs and expectations of its growing population. The Town's current Arena was built in 1973 and is nearing the end of its lifespan. The Library, which opened in 1994, has been unable to keep up with the Town's growing population and is no longer large enough to accommodate its customers or the programs and services it would like to offer today.¹

The new 120,252 sq. ft. facility will be constructed on 11 acres of property located at 544 River Rd. W. and will contain a 96,000 sq. ft. Twin-pad Arena and a 24,251 sq. ft. Library.¹

Below are several proposed features of the new facility:¹

Twin-pad Arena	Library
<ul style="list-style-type: none"> • Two NHL ice surfaces with 12 change rooms • Walking track and multipurpose rooms • Banquet hall • Central customer service desk • Canteen and tuck shop • Spacious lobby with seating area 	<ul style="list-style-type: none"> • Shared lobby with the Arena • Collaborative learning spaces/labs • Special activity and program zones • Safe and comfortable spaces for customers to relax, study, work, etc.

A high-level overview of the Town's project timeline for the new facility is provided below:^{1,2}



¹ Q&A: Twin-pad arena and library projects: [Link](#)

² Let's Talk Wasaga Beach website: [Link](#)

Twin-pad Arena and Library Overview

As per the Town's project timeline for the new facility, the following outlines the key next steps and requirements from a design and construction and staff planning perspective.

Next Steps/Requirements

Design and Construction

As part of the Town's next steps in planning, several immediate requirements have been identified that Town staff, Colliers International (Project Manager), and MacLennan Jaunkalns Miller Architects Ltd. (architect) will focus on. Specifically:¹

- Develop the site plan and concept design;
- Configure the Twin-pad Arena (e.g., seating, change rooms, etc.);
- Configure the Library (e.g., one or two levels);
- Develop a schematic design; and,
- Obtain Council's approval for all these elements.

These steps are necessary to finalize the design into tender ready specifications by December 2020.

Staff Planning

In addition, it was identified that a third-party assessment of staffing requirements was necessary to ensure optimized staffing levels for efficient and cost-effective operations of the new facility for its first five years. In order to support evidence-based planning and decision making, this assessment will take into consideration the current organizational structure of the Recreation, Events, and Facilities ("REF") Department as well as the Library to ensure the needs of these departments are balanced with the needs of the new facility. As such, MNP's assessment will focus on the following:

- Reviewing the current organizational structures of the REF Department and Library (including employee composition, skills and capabilities, etc.);
- Identifying the current and future needs of the REF Department and Library;
- Understanding collective agreements for existing staff in the REF Department;
- Understanding the impact of environmental pressures on staffing levels;
- Understanding the organizational culture regarding the strengths and opportunities for change;
- Identifying the key roles required to achieve goals and objectives for the new facility; and,
- Determining the impact of historical corporate events on the Facilities Division's employee composition.

¹ Q&A: Twin-pad arena and library projects: [Link](#)

Twin-pad Arena and Library Overview

A high-level overview of the Arena and Library's current programs and services are presented below to provide an understanding as to how these may evolve or increase in the new facility. Consideration has also been given to the addition of shared spaces in the new facility and what this may allow for in terms of additional programs and services.

Current State Programs and Services	Future State Programs and Services in the New Facility
Arena	
<ul style="list-style-type: none"> • Advertising • Auditorium rental (up to 180 persons) • Concession • Facility cleaning and maintenance • Ice rental (hockey and figure skating) <ul style="list-style-type: none"> ◦ 1 ice rink, 6 change rooms • Recreation hall rental (up to 96 persons) • Sports Camp (includes seasonal cabins) 	<ul style="list-style-type: none"> • Advertising • Canteen and tuck shop • Facility cleaning and maintenance • Ice rental (hockey and figure skating) <ul style="list-style-type: none"> ◦ 2 ice rinks, 12 change rooms • Indoor/special events (e.g. concerts, ball hockey, etc.) • Walking track
Library	
<ul style="list-style-type: none"> • Adult programming • Children and youth programming • Core library services (e.g. book borrowing, eBooks, access to computers, printing, etc.) • Facility cleaning and maintenance • Multi-use spaces (e.g. seating, working, etc.) • Room rental • Technical support 	<ul style="list-style-type: none"> • Increased adult programming • Increased children and youth programming • Core library services (e.g. book borrowing, eBooks, access to computers, printing, etc.) • Digital/technology programming • Facility cleaning and maintenance • Additional spaces (e.g. quiet zone, learning spaces, etc.) • Room rental • Technical support
Shared Spaces	
N/A	<ul style="list-style-type: none"> • Lobby • Central customer service desk • Multipurpose rooms for programming/rentals • Outdoor space

Wasaga Beach Recreation, Events, and Facilities Department

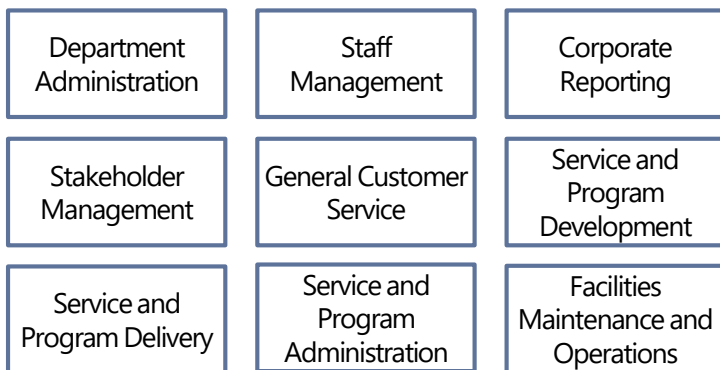
Below is a "snapshot" of the REF Department including its purpose, key functions, and organizational structure.

Purpose

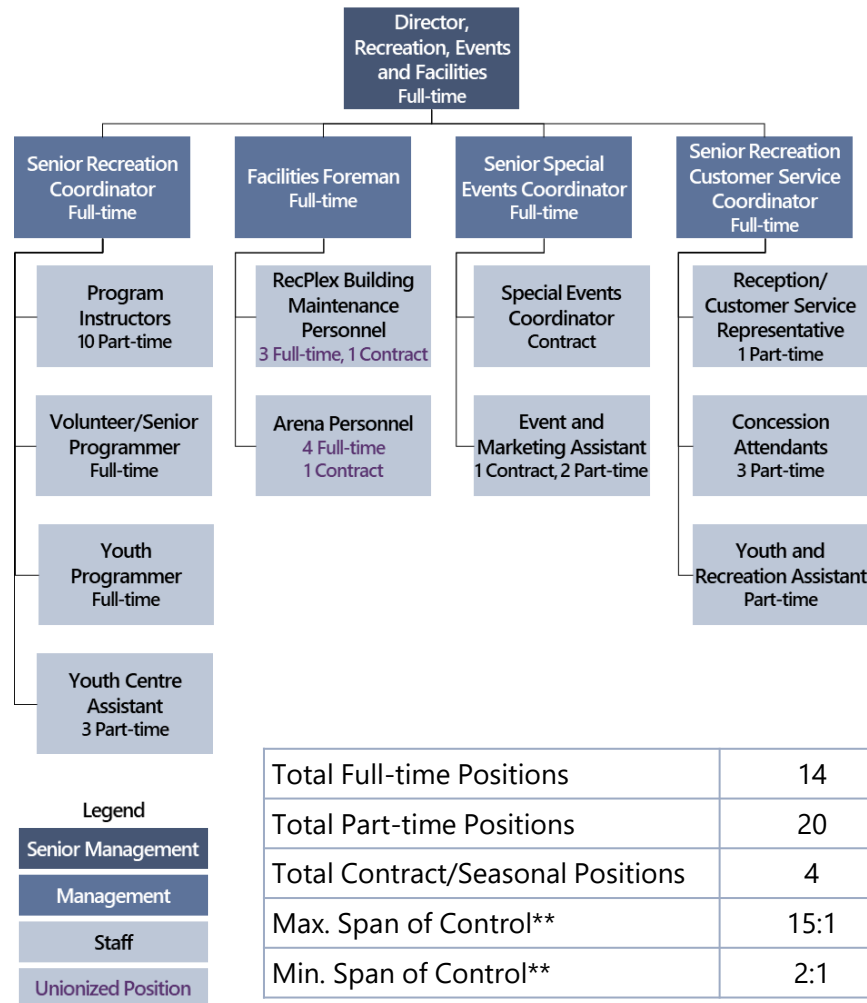
The REF Department offers recreation programs, events, and manages facilities to meet the needs of the community, Town staff, and Council. Its mission is to maintain and develop community assets and activities that connect and maximize quality public and visitor experiences while ensuring programs are accessible and meet the diverse needs of the community.¹

Key Functions*

To gain a clearer understanding of the work being performed by the REF Department, an inventory of its core functions has been developed. These functions represent the roles and responsibilities of the Department within the Town.



*Function descriptions can be found in **Appendix D**.



Total Full-time Positions	14
Total Part-time Positions	20
Total Contract/Seasonal Positions	4
Max. Span of Control**	15:1
Min. Span of Control**	2:1

**Excludes contract positions

¹Wasaga Beach Website: [Link](#)

Wasaga Beach Recreation, Events, and Facilities Department

Additional information of the REF Department, as it relates to this review, is provided below.

General Observations

- The REF Department has **four divisions**: 1) Special Events, 2) Administration, 3) Recreation, and 4) Facilities, each with its own mandate, programs and/or services, and staff. The Department does however communicate and collaborate as a team when and where appropriate.
- The REF Department **operates out of four municipal sites**: 1) RecPlex, 2) Arena, 3) Youth and Senior/Volunteer Centre, and 4) Events Centre and permits the Sports Complex. The Department is in direct contact with customers in each of these sites.
- Facilities staff within the RecPlex and Arena are the only **unionized staff** (a total of seven full-time positions and two contract positions) within the REF Department.
- Below is an overview of the **hours of operation for the five indoor municipal sites**.
 1. RecPlex:
 - Office Hours:
 - Monday-Tuesday – 8:00am to 4:30pm
 - Wednesday-Friday – 8:00am to 8:00pm
 - Open Saturday and Sunday based on rentals
 - Facility Hours:
 - Monday-Friday – 6:30am to close (depends on rentals)
 - Open Saturday and Sunday unless there are no rentals
 2. Arena:
 - Sunday-Saturday – 6:30am to 11:00pm
 3. Youth Centre:
 - Monday-Saturday – 3:30pm to 9:00pm
 - Closed Sunday
 4. Senior/Volunteer Centre:
 - Monday-Friday – 7:30am to 4:00pm
 - Closed Saturday and Sunday
 5. Special Events Office:
 - Sunday-Saturday – 8:30am to 4:30pm (when there are no events)



Wasaga Beach Recreation, Events, and Facilities Department

An assessment of the REF Department has been completed and is detailed below. General observations and key findings are based upon MNP's documentation review and key stakeholder interviews. The assessment has been broken down into four categories: 1) Strengths are highlighted to acknowledge successes and to identify features that must be maintained in future state options, 2) Challenges represent pain points and/or risks that need to be addressed in future state options, 3) Opportunities highlight gaps and/or possible areas of enhancement that should be considered in future state options, and 4) Other considerations are possible decisions/outcomes that can impact and/or influence future state options.

Current State Assessment

Strengths:

- The REF Department offers a **wide variety of programs and services** to meet the needs and expectations of the community. The Department is continually looking for ways to improve its offerings and provide the highest quality programs and services to its customers.
- The REF Department is viewed as a significant **contributor to the Town's overall culture and community engagement** as it continually looks to improve the experiences of its residents and visitors. Unlike mandatory services such as water and sewer, the REF Department provides programs and services that aim to enrich and improve the wellbeing of the community.
- The REF Department has **developed strong internal relationships with other departments** such as Public Works, Treasury, Administration, and the Library, **and has also developed strong partnerships with external organizations and agencies** such as Simcoe County and the YMCA.

Challenges:

- The REF Department **does not have an Operations Manager overseeing the day-to-day operations** of the department. This has resulted in the Department's Director having to take on this responsibility, pulling away from time spent managing Council, providing overall direction, and strategic planning. It is anticipated that the responsibility of managing the day-to-day operations will increase with the addition of the new facility.
- Staff within the Facilities Division are responsible for the sanitation and maintenance of a number of municipal buildings and facilities (e.g. Arena, RecPlex, Town Hall, Council Chambers, Youth Centre, etc.). **The workload of facilities staff is expected to increase with the sanitation requirements** dictated by COVID-19 and the addition of the new facility. Furthermore, it was noted that facility **sanitation has historically not been a priority within the Town**, with maintenance being the primary focus. With **no current service levels pertaining to sanitation**, it will be a challenge to adapt in the face of COVID-19 and to the anticipated customer service expectations with the new facility. Additional staff will likely be required to keep up with demand.

Current State Assessment (cont.)

Challenges (cont.):

- **Several pending retirements** within the REF Department pose a potential risk if the proper succession planning and knowledge management activities are not taken.
- The Recreation Division has been challenged by **limited programming and event space within its facilities, which has restricted the number and size of programs and events that can be offered**. With the addition of the new facility, there will be additional and larger spaces to accommodate programs and events, however, this will likely have an impact on the number of programming staff required. In particular, in addition to the overall anticipated population growth by 2030, there will be an increased demand for adult/senior programs, which has seen a 100% growth in participation over the last year. It is anticipated that the demand for adult/senior programming will only continue to increase with the Town's ageing population. Furthermore, the Town is also seeing more young families moving in, increasing the demand for children and youth programming.

Opportunities:

- In relation to the above challenge, there is the **opportunity to accommodate increased program and service demand through the use of seasonal staff, contract staff, and/or summer students**. This will provide additional support to full-time staff without placing a heavy financial burden on the Town.
- The Facilities Division does not have specialized trades staff (e.g. electrician, plumber, etc.). With the addition of the new facility, there is an **opportunity to review the required skills and expertise to determine whether an in-house specialized trades staff would be beneficial and economical**. Currently, specialized maintenance services such as heating, ventilation, and air conditioning (HVAC) are contracted out.
- Facilities staff within the Arena currently manage ice bookings, including scheduling and payment, which is then manually transferred to the RecPlex for electronic processing. There is an **opportunity to centralize all bookings along with other customer service needs within the new facility**. Having an independent customer service counter within the new facility will ensure ice bookings are maximized and customers are provided with a one-stop-shop for all their customer service needs. It is important to note that this opportunity does need to consider the possible implications to role responsibilities, as the facilities staff are unionized.
- Currently, three Youth Centre Assistants provide support to the Town's youth programming. There is an **opportunity to reclassify this position as a "Centre Assistant" to allow for more flexibility in its scope of work** (e.g. supporting both the youth and adult/senior programming, as well as customer service support).

Current State Assessment (cont.)

Opportunities (cont.):

- Customers are unable to register for programs online, which is a significant barrier from a customer service perspective. This also has implications on staffing, as recreation and customer service staff must manually register customers and provide in-person service. As such, the lack of online capability has resulted in greater work effort and time, which could be reduced through the use of technology. There is an **opportunity to streamline program registration, alleviating some of the pressure placed on staff.**
- The new facility also presents the **opportunity to host new and exciting indoor events such as live entertainment** (e.g. concerts or art and theatre shows). This will attract residents and tourists and will require the Town to determine what staffing these events will look like (e.g. utilizing current state vs. hiring contract/seasonal staff).

Other Considerations:

- There are still **some unknowns related to the new facility** (e.g. design, programs and services, etc.) that will need to be determined to fully understand the impact on staffing needs.
- Hours of operation currently vary across the different municipal buildings/facilities and with the addition of the new facility, **hours of operation may change for some positions, which will impact staffing and scheduling.**
- The **new facility will require the facilities staff to work alongside Library staff within shared spaces** (e.g. the lobby, hallways, etc.), which will be a significant shift as these two groups have historically had little interaction. This new interaction may also impact the facilities staff's workload, as service levels may vary between the Arena, shared spaces, and the Library. If it is determined that facilities staff will maintain the Library in addition to the Arena and shared spaces, **there will need to be consideration given towards different skill sets required to clean these two municipal sites** (e.g. cleaning locker rooms vs. cleaning bookshelves).
- **Several facilities are still maintained by the Parks Division** within the Public Works Department. **These facilities will eventually be transferred to the Facilities Division**, which will have an impact on staffing needs.
- The impact of the COVID-19 pandemic will without a doubt be felt within the REF Department, specifically related to **how program and services will be delivered in light of social distancing measures.** The Department must consider how it will staff its programs and services to ensure social distancing and smaller groups can be accommodated.

Wasaga Beach Public Library

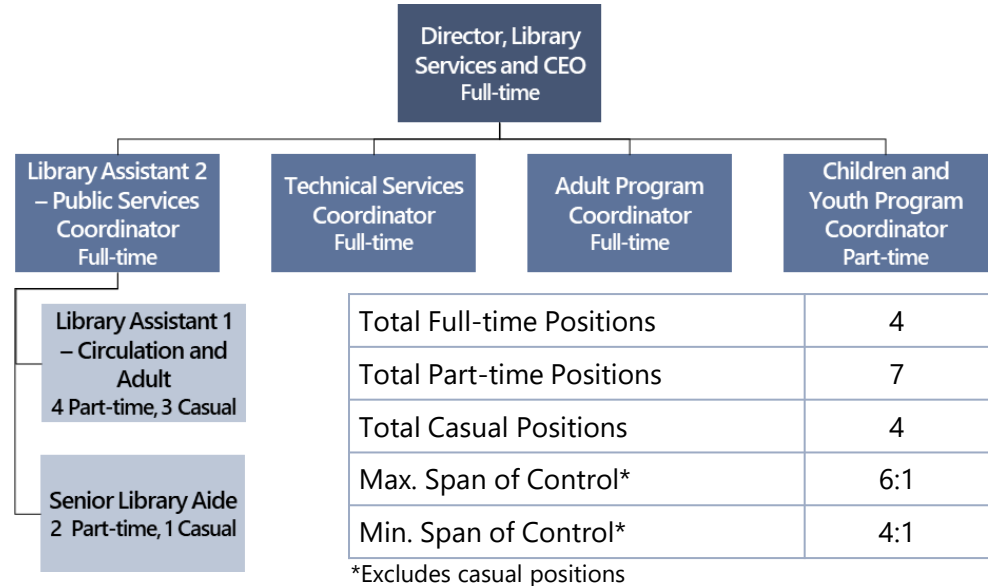
Below is a “snapshot” of the Library including its purpose, key functions, organizational structure, and additional information as it relates to this review.

Purpose

The Wasaga Beach Public Library provides a wide variety of programs and services to meet the needs of the community. Specifically, the Library offers traditional services such as book borrowing, photocopying, access to public computers, and room rentals, as well as several specialized programs and services such as STEM programming, virtual reality, and reading clubs.

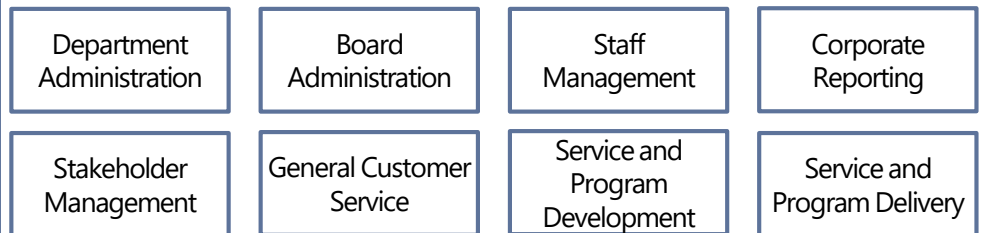
General Observations

- The Director of Library Services and CEO is viewed as one of the Town’s department heads despite reporting to a separate Library Board.
- The Library Board is responsible for overseeing the Library’s budget and finances, developing policies, building relationships with government, and defining the Library’s mission and overall direction.
- Library staff are not unionized.
- The Library welcomes roughly 60,000 visitors each year, with the largest demographic being senior citizens.
- Hours of operation:
 - Tuesday-Friday – 10:00am to 8:00pm
 - Saturday – 10:00am to 4:00pm
 - Sunday – 12:00pm to 4:00pm
 - Closed Monday



Key Functions**

To gain a clearer understanding of the work being performed by the Library, an inventory of its core functions has been developed. These functions represent the roles and responsibilities of the Library within the Town.



Function descriptions can be found in **Appendix D.

Wasaga Beach Public Library

An assessment of the Library has been completed and is detailed below. General observations and key findings are based upon MNP's documentation review and key stakeholder interviews. The assessment has been broken down into four categories: 1) Strengths are highlighted to acknowledge successes and to identify features that must be maintained in future state options, 2) Challenges represent pain points and/or risks that need to be addressed in future state options, 3) Opportunities highlight gaps and/or possible areas of enhancement that should be considered in future state options, and 4) Other considerations are possible decisions/outcomes that can impact and/or influence future state options.

Current State Assessment

Strengths:

- Similar to the REF Department, the Library is also viewed as a significant **contributor to the Town's overall culture and community engagement** as it too provides programs and services that aim to enrich and improve the wellbeing of the community.
- The Library has been **successful in integrating itself into the Town's overall operations, communicating and working in conjunction with various departments** such as Administration, Treasury, and Recreation, Events, and Facilities.
- The **organizational culture of the Library has been cited as one of its core strengths**, as it is viewed as enabling a positive environment and engaged staff. There is a high degree of emphasis placed on employee well-being and communication.
- In addition to engaged, the **Library's staff are recognized as being very knowledgeable and skilled**. The staff work well as a team and although they are not necessarily strong in numbers, they are strong in their capabilities.

Challenges:

- There are **some overlapping programs and services between the Library and the REF Department**, such as Spanish lessons that are offered at the Library for free or as paid programming by the Recreation Division. This is a challenge in that both the REF Department and Library have relatively small budgets and therefore the duplication of programs and services is not an effective use of budget. Furthermore, this overlap has resulted in the loss of volunteers, placing a strain on the overall operations of the Library.
- **The Library has also lost part time staff to the REF Department** because the Department is able to provide full time employment opportunities. This is a challenge because the loss of trained personnel results in additional costs to the Library in terms of time and expenses for recruiting and training.

Current State Assessment (cont.)

Challenges (cont.):

- The Library is in a **small building that has been unable to keep up with the growing needs and expectations of the community**. As a result, the Library's traffic and usage have started to plateau. For example, as a best practice, a library should have three books per capita, whereas the Library currently has one book per capita. This is primarily due to the Library's size, which limits resources and staffing. Other challenges related to the Library's size include a lack of programming space, staff workspace, multi-use/event space, and an overall challenge with the flow of traffic.
- The Library's **staffing complement is quite lean at the middle-management level**, limiting the number of new programs and services offered, as well as the amount of time dedicated towards administrative tasks such as staff training and planning.
- The Library's **IT network is provided and maintained by Simcoe County, separate from the rest of the Town**. This often poses a challenge as there is no local support for Library staff.

Opportunities:

- There are **several gaps in staffing and/or skills and capabilities** that pose an opportunity for future staff recruitment for the new facility. These include:
 - **Community Engagement Specialist** – a role dedicated to collecting feedback and engaging with the community. This position would also be responsible for marketing and advertising.
 - **Library Technician** – a role dedicated to researching and implementing emerging technology for internal staff to utilize and to offer externally as part of programs and services (e.g. coding, 3D printing, etc.).
 - **Dedicated Children and Youth Program Coordinator** – there is sufficient demand to warrant a full-time Children and Youth Program Coordinator or Children and Youth Librarian.

Other Considerations:

- The Library is **considering changing its hours of operations** (i.e. opening on Mondays) to better align with the Arena in the new facility. This will have an impact on staffing.
- With the Library co-locating with the Arena in the new facility, it will be important that these **two departments continue to strengthen their communication and collaboration**. For example, certain service levels (e.g. sanitation) will need to be discussed and agreed upon to ensure common spaces are of appropriate standards for both parties. There is also the opportunity to reduce costs by sharing resources (e.g. facilities staff).

Appendix D: Organizational Staffing Review Function Descriptions

Function Descriptions

REF Department Functions

- **Department Administration** – manage and coordinate the day-to-day operations of the Department (e.g. conducting business, financial, and strategic planning, developing departmental policies, processing accounts receivables, researching and preparing grant/funding applications, contract management, etc.).
- **Staff Management** – manage and coordinate the Department’s staffing including volunteers, performance management, and employee relations (e.g. recruiting staff, ensuring succession planning, conducting performance evaluations, etc.).
- **Corporate Reporting** – develop and disseminate reporting for the Department (e.g. monthly financial reports, staff reports, etc.).
- **Stakeholder Management** – coordinate and communicate with stakeholders on matters relating to the Department and its programs and services (e.g. meeting with public groups and community members to explain, engage, schedule, and promote programs and activities, developing partnerships with other agencies and organizations, developing advertising and media releases, etc.).
- **General Customer Service** – oversee and provide general customer service support at the Department’s front desks/customer service counters (e.g. greeting visitors, answering inquiries, processing payments, etc.).
- **Service and Program Development** – develop and implement programs and services for the Recreation and Special Events Divisions (e.g. researching, planning, and developing recreational and community service programs, developing and updating any and all required resource materials, etc.).
- **Service and Program Delivery** – manage and deliver programs and services offered by the Recreation and Special Events Divisions (e.g. delivering recreation programs, organizing and facilitating events, etc.).
- **Service and Program Administration** – manage and coordinate the day-to-day operations of the programs and services offered by the Recreation and Special Events Divisions (e.g. developing the recreation guide, coordinating and scheduling bookings, ordering necessary inventory/materials, etc.).
- **Facilities Maintenance and Operations** – oversee and maintain the municipal buildings and facilities under the Department (e.g. ensuring the municipal buildings and facilities are maintained and operated in a clean and safe manner, performing building inspection, maintenance, and janitorial duties, setting-up and dismantling equipment and material for events, etc.).

Function Descriptions

Library Functions




- **Department Administration** – manage and coordinate the day-to-day operations of the Library (e.g. conducting business, financial, and strategic planning, developing library policies, managing procurement, etc.).
- **Board Administration** – support and communicate with the Library Board (e.g. preparing agenda packages, providing ongoing advice and reporting, etc.).
- **Staff Management** – manage and coordinate the Library’s staffing including volunteers, performance management, and employee relations (e.g. recruiting staff, ensuring succession planning, conducting performance evaluations, etc.).
- **Corporate Reporting** – develop and disseminate reporting for the Library (e.g. monthly financial reports, staff reports, etc.).
- **Stakeholder Management** – coordinate and communicate with stakeholders on matters relating to the Library (e.g. maintaining a relationship with government ministries, updating the community on new initiatives, representing the Library to service partners and community organizations, etc.).
- **General Customer Service** – oversee and provide general customer service support at the Library’s circulation desk (e.g. greeting visitors, answering inquiries, processing payments, etc.).
- **Service and Program Development** – develop and implement programs and services for the Library (e.g. liaising with stakeholders to assess needs, developing training materials for staff/volunteers, identifying and implementing modifications to existing programs and services, etc.).
- **Service and Program Delivery** – manage and deliver traditional and specialized programs and services offered by the Library (e.g. maintaining the collection, providing technical assistance, facilitating programs, arranging speakers/guests, etc.).

Appendix E: Organizational Staffing Review Staffing Model




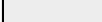
Staffing Model Overview

Legend

All fields with numerical values are colour coded based on the legend below:

	Assumptions that are not linked to formulas but are provided for context.
	Assumptions that are linked to formulas and can be modified if circumstances change.
	Calculated cells that are not to be modified.

All fields with qualitative information are colour coded based on the legend below:

	Information that is not linked to formulas and has been provided for context.
	Criteria that is linked to formulas that can be modified if circumstances change.
	Information that has been intentionally left blank as it is not applicable. If circumstances change, this information can be converted to criteria and assumptions that are linked to formulas.
	Calculated cells that are not to be modified.

Model Instructions

Changing Assumptions

1. To change the assumptions in the "Assumptions" tab, the only cells that need to be modified are those containing orange numerical values and green qualitative information.
2. Although it is not necessary, it is recommended that the blue qualitative information also be updated to provide context as to where the values came from.
3. Once changed, the staffing projections in the "Facility YR 1-5" and "Library YR 1-5" will automatically update.

Staffing Model Glossary

A glossary of terms used within the staffing model is provided below for additional context.

Term	Definition
Cleaning	Daily cleaning of the facility's spaces including vacuuming, emptying garbage/recycling bins, washing floors, etc.
Core Hours	The busiest hours of the day for a particular program/service (may vary between the Arena, Shared Space (i.e. Customer Service) and Library).
Frequency	The interval at which a task, program or service occurs (e.g. daily, weekly, monthly, etc.).
Maintenance	Ad hoc repairs, inspections and testing to ensure buildings are up to code and running smoothly (e.g. equipment repairs).
Operations	Day-to-day activities that enable the Town to provide programs and services to customers (e.g. cleaning, flooding and maintaining ice surfaces).
Peak Months	The busiest months of the year for a particular program/service (may vary between the Arena, Shared Space (i.e. Customer Service) and Library).
Period	The year(s) a program/service/task will be offered in the new facility.
Program	An organized activity provided by the Town to a group of individuals on a regular basis (e.g. recreational programming).
Sanitizing	Regular disinfecting (i.e. deep cleaning) to ensure areas and surfaces are safe for the public.
Service	Basic services provided by the Town in exchange for taxes and user fees paid by residents.
Task	Duties required in order to operate, maintain or provide a program, service or facility.

Staffing Model Assumptions

General assumptions (e.g. hours of work and hours of operation) were developed and validated by the Wasaga Beach Project Team.

Hours of Work				
Classification	Hours per day	Hours per week	Hours per year	Notes/Rationale
Full-time (REF Dept.)	8	40	2080	Based on Ontario's hours of work standards ¹
Full-time (Library)	7	35	1820	Based on the Library's current state full-time hours of work
Part-time	5	24	1248	Based on the Town's average current state part-time hours of work
Unionized	8	40	2080	Based on the CUPE Collective Agreement (exp. 31/12/2020)

Hours of Operation								
Location	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Notes/Rationale
Arena	06:00-24:00	06:00-24:00	06:00-24:00	06:00-24:00	06:00-24:00	06:00-24:00	06:00-24:00	Total of 18 hours a day. Includes the time required for staff to open and close the Arena
Library	09:30-16:30	09:30-20:30	09:30-20:30	09:30-20:30	09:30-20:30	09:30-20:30	09:30-16:30	Total of 7 hours a day on weekends and 11 hours a day on weekdays. Includes the time required for staff to open and close the Library
Shared Space	06:00-24:00	06:00-24:00	06:00-24:00	06:00-24:00	06:00-24:00	06:00-24:00	06:00-24:00	Total of 18 hours a day. Includes the time required for staff to open and close the Shared Space

¹[Link to Ontario Ministry of Labour Standards](#)

Staffing Model Assumptions

Assumptions specific to each of the new facility's locations (i.e. Arena, Shared Space, and Library) were also developed and validated by the Wasaga Beach Project Team.

Arena				
Task/Program/ Service Name	Schedule	Required Work Effort		Notes/Rationale
	Period	Avg. Time Required (hrs)	Frequency	
Canteen		N/A		The Canteen and Tuck Shop will be contracted out to third-party suppliers.
Arena Operations	YR 1-5	25.14	Daily	The Arena's average hours of operation is 18 hours per day and requires one staff to be present at all times. Two staff are required during core hours (Mon-Fri 15:00-21:00, Sat-Sun 08:00-18:00), an average of 7.14 hours per day. Arena operations includes cleaning, flooding and maintaining ice surfaces, setting up and taking down equipment, etc. After 20:00, the Arena Operations position will take over the Customer Service function.
Recreational Programming		N/A		Recreational programs provided within the Arena will be staffed on an 'as needed' basis, which is the current process within the Recreation Division.
Special Events		N/A		Special events will be run through the REF's Events Division, which is not expected to increase in staffing levels with current demand.
Tuck Shop		N/A		The Canteen and Tuck Shop will be contracted out to third-party suppliers.
Walking Track		N/A		The walking track will be an automated service that does not require dedicated staff.

Staffing Model Assumptions

Assumptions specific to each of the new facility's physical spaces (i.e. Arena, Shared Space, and Library) were also developed and validated by the Wasaga Beach Project Team.

Shared Space				
Task/Program/ Service Name	Schedule	Required Work Effort		Notes/Rationale
	Period	Avg. Time Required (hrs)	Frequency	
Customer Service	YR 1-5	15.21	Daily	The customer service desk in the lobby needs to be staffed from 8:00-20:00 (12 hours per day). Two staff are required during core hours to ensure sufficient coverage. Core hours are Mon-Fri 16:30-20:00 (an average of 3.21 hours per day). Coverage of the customer service desk after 20:00 will fall under Arena Operations.
Facility Cleaning and Sanitizing	YR 1-5	18.00	Daily	Staff need to be present from open until close to clean and sanitize the Arena (after each rental) and the Shared Space. It is assumed that staff will go back forth between the Arena and Shared Space throughout the day, as well as providing "spot cleaning" to the Library.
Facility Cleaning and Sanitizing Support during Peak Months	YR 1-5	5.22	Daily	Two staff are required for facility cleaning and sanitizing during peak ice rental months (mid-Oct until end of Nov, Jan-Feb). A total of 104.5 days a year (29% of the year).
Facility Maintenance	YR 1-5	12.00	Weekly	Separate from Arena Operations and Facility Cleaning and Sanitizing, Facility Maintenance represents ad hoc repairs, inspections and testing to ensure the building is running smoothly. Maintenance is not required everyday, it is expected that maintenance will be required 2-3 times a week for an average time of 4 hours (a max of 12 hours weekly).
Recreational Programming		N/A		Recreational programs provided within the shared space will be staffed on an 'as needed' basis, which is the current process within the Recreation Division.

Staffing Model Assumptions

Assumptions specific to each of the new facilities locations (i.e. Arena, Shared Space, and Library) were also developed and validated by the Wasaga Beach Project Team.

Library				
Task/Program/ Service Name	Schedule	Required Work Effort		Notes/Rationale
	Period	Avg. Time Required (hrs)	Frequency	
Library Programming and Engagement	YR 1-5	15.00	Daily	It is expected that the Library will extend and expand its programming and engagement efforts, as identified in the Library Needs Assessment. This will include an increase in traditional programs, community programs, support programs, etc. It is assumed that multiple programs will be offered daily, requiring staff to plan, coordinate and deliver programs daily. In 2018, 625 programs were offered (an average of 1.8 per working day). It is assumed that programs will increase by 76% upon the new facility's opening (as per the Library Operating Forecast), resulting in roughly 1100 programs offered (an average of 3 per working day). It is assumed that each program takes an average of 5 hours a day (30 mins to set up, 30 mins to tear down, contacting potential coordinators 1 hour, promotion (e.g. newsletters) 1 hour, delivering programming 2 hours).
Library Operations and Public Services	YR 1-5	29.71	Daily	Library operations and public services represent the tasks and services that take place at the "front of the house" such as customer service, managing and operating the circulation desk, providing support to other library staff, etc. A full-time staff is required to oversee and manage the library's operations and public services. On top of this, the library is open for an average of 9.86 hours per day, during which the circulation desk needs to be staffed. The circulation desk also needs one additional staff during core hours, which equates to an additional 4 hours per day. Lastly, given the increased size of the library, the expected increase in traffic and programs, additional support or "floaters" are required during the week from 10:00-20:00 and on weekends from 10:00-16:00, an average of 8.86 hours per day.

Staffing Model Assumptions

Assumptions specific to each of the new facilities locations (i.e. Arena, Shared Space, and Library) were also developed and validated by the Wasaga Beach Project Team.

Library				
Task/Program/ Service Name	Schedule	Required Work Effort		Notes/Rationale
	Period	Avg. Time Required (hrs)	Frequency	
Technical Services	YR 1-5	24.43	Daily	Technical services represent the tasks and services that take place at the "back of the house" such as managing the computers and technical aspects of the library, cataloguing, and managing, maintaining and supporting the collection. With an expected 374% increase in program and collection maintenance, a full time staff member is required for collection management, collection processing, and technical troubleshooting, support and digital lab back-up for a total of three full-time staff. Day-to-day collection maintenance requires an average of 9.43 hours per day.
Facility Cleaning and Sanitizing		N/A		Facility cleaning and sanitizing is contracted out to a third-party.

Staffing Model Requirements

Assumptions were then used to calculate the required work effort by week and month.

Arena Required Work Effort						
Task, Program or Service	Name	Schedule	Required Work Effort			
		Period	Time required (hrs)	Frequency	Total time required per week	Total time required per month
Service	Canteen	0	N/A	0	0	0
Task	Arena Operations	YR 1-5	25.14	Daily	176	762
Program	Recreational Programming	0	N/A	0	0	0
Service	Special Events	0	N/A	0	0	0
Service	Tuck Shop	0	N/A	0	0	0
Service	Walking Track	0	N/A	0	0	0

Shared Space Required Work Effort						
Task, Program or Service	Name	Schedule	Required Work Effort			
		Period	Time required (hrs)	Frequency	Total time required per week	Total time required per month
Service	Customer Service	YR 1-5	15.21	Daily	106	461
Task	Facility Cleaning and Sanitizing	YR 1-5	18	Daily	126	546
Task	Facility Cleaning and Sanitizing Support during Peak Months	YR 1-5	5.22	Daily	37	158
Task	Facility Maintenance	YR 1-5	12	Weekly	12	52
Program	Recreational Programming	0	N/A	0	0	0

Staffing Model Requirements

Assumptions were then used to calculate the required work effort by week and month.

Library Required Work Effort						
Task, Program or Service	Name	Schedule	Required Work Effort			
		Period	Time required (hrs)	Frequency	Total time required per week	Total time required per month
Program	Library Programming and Engagement	YR 1-5	15	Daily	105	455
Service	Library Operations and Public Services	YR 1-5	29.71	Daily	208	901
Service	Technical Services	YR 1-5	24.43	Daily	171	740
Task	Facility Cleaning and Sanitizing	0	N/A	0	0	0

Staffing Model Requirements

Based on the required work effort by week and month, a total number of required full-time equivalent (FTE) staff was calculated for each of the new facility's physical spaces (i.e. Arena, Shared Space, and Library).

Arena Required Staff Per Year									
Year 1	Number of FTE Staff Required (#)	Year 2	Number of FTE Staff Required (#)	Year 3	Number of FTE Staff Required (#)	Year 4	Number of FTE Staff Required (#)	Year 5	Number of FTE Staff Required (#)
9144	4	9144	4	9144	4	9144	4	9144	4

↑ Represents the total required work effort (hours) per year.

Shared Space Required Staff Per Year									
Year 1	Number of FTE Staff Required (#)	Year 2	Number of FTE Staff Required (#)	Year 3	Number of FTE Staff Required (#)	Year 4	Number of FTE Staff Required (#)	Year 5	Number of FTE Staff Required (#)
14601	7	14601	7	14601	7	14601	7	14601	7

↑ Represents the total number of full-time equivalent positions required for the programs/services/tasks in a particular space.

Staffing levels identified in the structural options are based on this information, however, through the design process, the FTE numbers displayed here have been converted into a combination of full-time, part-time, and contract (e.g. 1 full-time position represents 1.6 part-time positions).

Staffing Model Requirements

Library Required Staff Per Year									
Year 1	Number of Staff Required (#)	Year 2	Number of Staff Required (#)	Year 3	Number of Staff Required (#)	Year 4	Number of Staff Required (#)	Year 5	Number of Staff Required (#)
25149	14	25149	14	25149	14	25149	14	25149	14

Note: This projection does not factor in the expected growth of the Library's services and customers as this is not a quantifiable number that can be incorporated into the staffing model. It will be important that the staffing structure be continually assessed to ensure the Library is able to optimally meet the needs and demands of customers. As the Library continues to grow, benchmarking of comparator municipal libraries is suggested.

Appendix F: Customer Service Site Profiles

Town Hall Municipal Service Site Profile: Overview

Location and Hours of Operation

30 Lewis Street

Hours: Monday-Friday
8:30am to 4:30pm

Customer Service Standards / KPIs

Customer service standards are not currently being measured or reported on.

Description of Counter Services

Town Hall has three Counter Service desks: **Treasury, Building and Planning,** and **Bylaw.** All counters respond to general inquiries and provide support to customers as it relates to their respective department. Customers interact with customer service representatives via email, phone, or walk-in visits and support the functions of their department by accepting and filing documents, applications, paperwork, etc.

Key Observations

- The general public inquiries that counters are required to address are time consuming and restrict customer service agents from focussing on department-specific responsibilities.
- Customer service training has not been provided and there is no indication of a customer service training budget for public-facing staff.
- Customer service agents are highly effective given their available tools however, processes tend to be paper-based and manual which can reduce the efficiency of service delivery.
- The departments currently use MiLisa as a customer relationship management (CRM) system however, staff do not have access to view relevant information pertaining to previous interactions a customer has had with other municipal counter service sites. The departments located at Town Hall are in the process of replacing MiLisa with CityView.



Town Hall Municipal Service Site Profile: Treasury

Location and Hours of Operation

30 Lewis Street
(705) 429-3844

Hours: Monday-Friday
8:30am to 4:30pm

Description of Counter Services

Under the Municipal Act, Treasury is responsible for handling all of the financial affairs of the municipality, including collecting money payable to the municipality and issuing receipts for those payments, in the manner directed by Council. Treasury staff process tax and water payments, as well as receive customer payments on behalf of the other counters. Treasury is the main counter that customers are able to process payments with credit or debit. Counter services at most municipal sites can accept cash/cheque or debit/credit transactions to take payments from customers. Treasury staff are then required to reconcile these payments at the end of the day and post transactions to a general ledger account. Treasury staff also respond to general municipal service inquiries (e.g. hours of operation) as well as specialized departmental service inquiries (e.g. personal tax accounts). Finally, Treasury staff perform a number of general customer services including the selling of parking/transit passes, waste management bad tags, and dog tags.

Staffing

FTE: 1.0 Customer Service Representative, 1.0 Revenue Clerk (back-up), and summer students to assist with high customer volumes experienced in the summer months.

Key Observations

- Treasury is the first counter that customers see when they walk into Town Hall and is often utilized by customers as the main desk for general inquiries.
- Financial transactions (i.e. customer payments) are centralized with Treasury and there is an expectation that offering increased payments capabilities to other departments will require educating staff and implementing proper financial procedures (e.g. proper procedures for handling credit/debit card transactions) to mitigate the organizational risk as it relates to sharing personal information, cybersecurity, and Payment Card Industry (PCI) compliance.
- Pin-pads have been issued recently (Public Works, Planning/Building) because of COVID, while other facilities have had pin-pad machines for many years (Library, RecPlex).

Technology

Technology: Diamond

Diamond is the financial system for all financial transactions and reporting from the general ledger to the audited financial statements. It includes the receipting of payments and recording of revenues. Treasury is the only department with access to Diamond. The only necessary receipts out of Diamond are for tax and water. Treasury uses scanners to process tax and water bill payments, which help to ensure payments are accurately processed. If it is determined that tax and water payments should be decentralized, departments will need to be given specific access to Diamond's receipting window. Upper management cannot access information such as when and where revenues are collected at each facility/department, however, a report from the Diamond Smartlist adhoc reporting system can be generated. There is the perception that there is a lack of system integration that requires cash or cheque payments to be physically passed through multiple staff members before it is deposited in the bank, however this seems to be a process issue, which could be resolved by having all cash or cheque payments being directly transferred to Treasury, with copies of the payments (e.g. scanned cheques) being sent to the departments afterwards for their own processing.

Town Hall Municipal Service Site Profile: Building Planning

Location and Hours of Operation

30 Lewis Street
Building: (705) 429-1120
Planning: (705) 429-3847

Hours: Monday-Friday
8:30am to 4:30pm

Description of Counter Services

Building and Planning provides general support in the form of responding to general municipal service inquiries (e.g. hours of operation), providing general departmental service coordination, and accepting service payments (e.g. permits) by debit/credit or cash/cheque. Building and Planning also provides specialized services to the public as it relates to their department. Building staff receive and process building applications, respond to building permit inquiries, and schedule building inspections with customers. Planning staff support customers with planning applications, schedule Planners to meet with customers, and respond to specific planning related inquiries.

Technology

Building Technology: MiLisa, BlueBeam

Planning Technology: MiLisa, GIS, investigating use of BlueBeam.

CityView was recently purchased to replace MiLisa for Bylaw, Building, and Planning. Staff believe MiLisa has data integrity issues, however the process decisions made during implementation resulted in the City operating the tool in a way that created data in an unstructured format. This ultimately limits the tools ability to provide meaningful reports.

BlueBeam is also used by building to collaborate on applications by leaving comments and marking up documents. GIS is a mapping system managed by Simcoe County that is used to view zoning for planning.

Staffing

- **Building FTE:** 1.0 Administrative Assistant – Building/Permit Clerk
- **Planning FTE:** 1.0 Administrative Assistant – Planning

Key Observations

- Building and Planning used to be in separate locations within Town Hall however, the counters merged into one location in an effort to streamline customer service and provide back-up staff.
- Building and Planning were provided a mobile pin pad to accept credit and debit payments for application fees and permits. This has enhanced the effectiveness of customer services, however the IT systems are not integrated and staff are required to reconcile with treasury at the end of each day, which can be a time-consuming and manual process.
- The Planning Department's responsibilities have expanded to include economic development which has increased the workload for staff and the possible counter services that can be offered to customers at this particular counter. There is a possibility for the Economic Development Officer to have a role at the counter to provide information related to tourism, starting a business, buying a house, etc.

Town Hall Municipal Service Site Profile: Bylaw

Location and Hours of Operation

30 Lewis Street
(705) 429-3844

Hours: Monday-Friday
8:30am to 4:30pm

Description of Counter Services

Bylaw provides general support in the form of responding to general municipal service inquiries (e.g. hours of operation), providing general departmental service coordination, and accepting service payments for parking passes by debit/credit or cash/cheque. Bylaw staff also assist customers in specialized services including disputing parking tickets, filing Bylaw complaints, and obtaining business licences.

Technology

Technology: MiLisa

CityView was recently purchased to replace MiLisa for Bylaw, Building, and Planning. CityView is meant to improve the customer service process by providing one IT system for the three departments. This is expected to enable staff to view previous interactions a property has had with the other departments. CityView is also expected to provide residents with the ability to view their taxes, dog tags, parking tickets, etc. which will improve customer service. There are challenges with payment services at Bylaw because the counter does not have mobile pin pad capabilities which requires customers to travel to treasury for all payments.

Staffing

- **FTE:** 1.0 Bylaw Administrative Assistant / Licensing Coordinator

Key Observations

- A third-party call answering service provider supports bylaw staff when they experience high call volumes and after-hours. Calls that are serviced by this provider are then relayed to Bylaw through fax or email.
- There is a perception amongst staff that Bylaw experiences the greatest volume of inquiries. Staff believe the number of complaints have been increasing and as a result they do not have the capacity to address customer needs in timely manner.
- Bylaw is unable to accept payments and therefore must fill out manual payment receipts for customers to bring to Treasury for processing. Once processed, customers are then required to return the receipt to Bylaw for filing. Staff perceive this manual process as a challenge as it can lead to errors, result in inconsistencies due to multiple touchpoints, and limits the department's ability to verify payment. This hinders the effectiveness of customer service as it is inconvenient for customers and time-consuming for staff to coordinate with Treasury.
- Given the COVID-19 pandemic, Bylaw recently received approval from Treasury to accept payment for parking passes.

Library Municipal Service Site Profile

Location and Hours of Operation

120 Glenwood Drive
(705) 429-5481

Hours: Tuesday-Friday/10am-8pm
Saturday/10am-4pm
Sunday/12pm-4pm

Customer Service Standards / KPIs

Customer service standards are not currently being measured or reported on.

Description of Counter Services

Library staff respond to general public inquiries related to municipal services (e.g. hours of operation, service locations, etc.), accept cash/cheque payment for transit passes.

Technology

Technology: Plymouth Rocket Eventkeeper, Google Calendar, and SirsiDynix WorkFlows
The Library is on Simcoe County's network which is different from the Town and is challenging for staff as they are not provided with local support. Library staff are required to collaborate with both Simcoe County IT and the Town's IT department.

Staffing

- **FTE:** 4.0 part-time Library Assistants – Circulation and Adult, 3.0 casual Library Assistants – Circulation and Adult, and 3.0 part-time Senior Library Aide

Key Observations

- Staff perceive that they are unable to meet customer expectations with the current facility because they do not have the physical space or staff capacity to offer desired programs. It is felt that customer volumes are plateauing for this reason.
- Staff indicated that there is a possibility Library staff may unionize as the team continues to grow which needs to be considered when determining future state recommendations. It will be important to understand what unionized positions look like within the Library and how this could impact service delivery.
- There are concerns surrounding the hours of operation when the new Twin-pad Arena and Library facility opens because the Arena will likely be open late to accommodate hockey schedules. This implies that the Library may remain open later to maintain the same hours of operation and to maximize foot traffic that may be brought in from the Arena.

RecPlex Municipal Service Site Profile

Location and Hours of Operation

1724 Mosley Drive
(705) 429-3321

Hours: Monday-Friday
8:00am-4:30pm

Customer Service Standards / KPIs

Customer service standards are not currently being measured or reported on.

Description of Counter Services

Recreation staff operate out of four municipal sites: 1) RecPlex, 2) Arena, 3) Youth and Senior/Volunteer Centre, and 4) Events Centre and permits the Sports Complex. Counter services are only provided out of the RecPlex. Staff in the RecPlex provide general support in the form of responding to general municipal service inquiries (e.g. hours of operation), providing general departmental service coordination, accepting service payments (e.g. transit passes) by cash/cheque, and general customer services including the selling of transit passes. Staff are also responsible specialized services such as providing recreational brochures, program registration, event applications, and facility rentals, which include hall rentals, pavilion rentals, soccer pitches, and baseball rentals.

Technology

Technology: Book King

Book King is a cloud-based recreation management software for bookings and registration. Book King has the capability to process customer payments for program registration however, there has been a delay in linking this software with the Town's bank account due to contract negotiations and COVID-19. This is a challenge because there is a growing demand for customers to pay and register for programs online.

Staffing

- **FTE:** 1.0 Recreation Customer Service Supervisor, 1.0 part-time Reception/Customer Service Representative, and 1.0 part-time Youth and Recreation Assistant.

Key Observations

- Having recreation, events, and facilities counter services offered only out of the RecPlex is challenging because customers often go to various recreation locations assuming they can sign up and pay for programs at all sites when this is not possible.
- Due to the Town's lack of online registration capability, staff experience a high volume of in-person counter visits which is a challenge given the restricted hours of operation which fall within type working hours.
- Staff perceive the customer service area to be physically small, limiting the number of staff that are able to provide counter services at a given time. Planning for the new facility should consider the spatial needs of staff.

Public Works Municipal Service Site Profile

Location and Hours of Operation

150 Westbury Street
(705) 429-2540

Hours: Monday-Friday
8:00am-4:30pm

KPIs

Customer service standards are not currently being measured or reported on.

Description of Counter Services

The Public Works counter is responsible for responding to general inquiries and specific requests as it relates to water, wastewater, utilities, streets, lights, parks, and road occupation permits. Public Works staff are also required to schedule site visits for the engineering department. Public works staff respond to the public over the phone, email, or in person. This municipal site also accepts cash/cheque payments for waste management bag tags.

Technology

Technology: Work Manager, Outlook (for scheduling)
Incoming calls are logged in Work Manager and work orders are printed out and provided to the foreman. Staff indicated that they are unable to retrieve reports from this system. It was also noted that it would be beneficial to have a system that connects Public Works with Bylaw, Building, and Planning to review all Town interactions with a specific property and outstanding complaints.

Staffing

- **FTE:** 3.0 Administrative Assistant (1 main individual and 2 back-up staff)

Key Observations

- Public works is unable to accept payments which is a challenge because customers expect to be able to pay public works related bills at the counter. Customer service staff are required to redirect the customers to Treasury to complete payments, which is at a different site location.
- Customer Service Staff perceive there to be frequent back and forth interactions between other departments on behalf of customers which is time consuming and inconvenient.

Fire Hall Municipal Service Site Profile

Location and Hours of Operation

966 River Road West
(705) 429-2540

Hours: Monday-Friday
8:00am-4:30pm

KPIs

Customer service standards are not currently being measured or reported on.

Description of Counter Services

The Fire Hall counter is responsible for responding to general inquiries and specific requests as it relates to permits, information requests, and specialized fire services (e.g. site tours, car seat installations, etc.). Counter staff respond to the public over the phone, email, or in person.

Technology

Technology: FIREHOUSE, Outlook (for scheduling)
FIREHOUSE is the records management software used for incident reporting, prosperities and inspections, compliance, and personnel management.
Microsoft Outlook is used to schedule inspections

Staffing

- **FTE:** 1.0 Administrative Assistant

Key Observations

- The Fire Hall has seen an increase in the number of walk-ins year over year requesting assistance with general inquiries
- There is a desire to find a way to connect Bylaw, Building, Planning, and Public Works IT systems as it would be very helpful to look up historical records or to coordinate site visits.
- There is a desire to implement scheduling software on the Wasaga Beach website so the public could self-select a date/time for site tours

Appendix G: Customer Service Delivery Opportunities Assessment

Provide standardized customer service.

Description of Opportunity

Customers expect the same level of consistent and reliable service delivery at each municipal site offering counter services, regardless of the communication channel used to interact with staff (i.e. phone call, walk-in, email, social media, etc.). The Current State Assessment identified that Wasaga Beach does not offer consistent services across municipal sites and does not have a formal customer service training program in place for public facing staff. There is an opportunity to provide standardized customer service across all municipal sites offering counter services. This would help to drive consistency in terms of key messaging, service quality, and customer experience. To ensure consistent customer service, it would be beneficial for the town to provide standardized customer service training for staff, and to improve communications and branding.

Evaluation Criteria

Description

Improve Customer Service Delivery (weight: 45%)

Providing standard services across all municipal sites would improve customer experience as they would not be required to travel between municipal sites. It would also ensure staff are better equipped to provide efficient and effective customer service through consistent communications, branding, and training.



Increase The Efficiency of Customer Service Delivery (weight: 35%)

Providing training to staff to offer consistent services will increase the likelihood of staff's ability to address an inquiry or concern at the first point of contact with a customer. Although this will somewhat increase efficiency by reducing the time and resources spent on one customer, the main outcome will be improved customer service delivery.



Reduce The Total Cost of Counter Services (weight: 20%)

The total cost of counter services may reduce as a result of increased efficiencies, however, providing staff with the tools and customer service training to standardize customer service has associated costs (both time and money) that may offset these savings.



Total Score 3.05

Impact:

Medium

- Standardizing services across municipal sites would provide Wasaga Beach staff with the ability to provide additional services. Staff would have the proper tools and support to build on their already customer service-oriented mindset so they can provide high quality customer service.
- Standardizing customer service across all municipal sites would enhance the customer experience because customers would not have to travel between municipal sites as frequently.

Ease of Implementation:




Medium

- Developing standardized customer services requires an understanding of the needs and expectations of the Town's customers to ensure the tools and training provided to staff is adequate to address the public's inquiries and incidents.
- Ensuring staff have the time available to participate in training (whether it is online or in a classroom setting) is an anticipated challenge and will require an investment in either e-training programs, or to have an instructor lead a classroom.
- Standardizing customer service across municipal counters will require an investment (in time and money) in a communications plan and consistent branding to ensure staff have the tools to provide efficient and effective service.
- Providing consistent customer service will also likely require change management support to ensure the desired behaviours, skills, and competencies are developed.

Develop customer service standards to track and report on customer service performance.

Description of Opportunity

Findings from the current state assessment identified that the municipal sites have not established customer service standards or metrics to track and report on customer service performance. Tracking and reporting against customer service standards would help Wasaga Beach manage customer and staff expectations and would help to shape the customer experience and relationship. Examples of customer service standards include but are not limited to, speed, accuracy, friendliness, efficiency, and accessibility. As the Town gains more visibility into their performance and how well it is managing and aligning customer and staff expectations, the better equipped it will be to identify opportunities for continuous improvement.

Evaluation Criteria	Description	
Improve Customer Service Delivery (weight: 45%)	Developing service level standards and measuring performance will help to provide consistent customer experience, however, it will indirectly improve customer service delivery as the Town would have to implement changes to see improvements.	 2/4
Increase The Efficiency of Customer Service Delivery (weight: 35%)	Reporting on performance against standards would provide a basis to evaluate the efficiency of customer service delivery, however, this would only identify areas for improvement. To see an increase in efficiency, the Town would have to implement changes.	 2/4
Reduce The Total Cost of Counter Services (weight: 20%)	Measuring customer service standards and performance may identify areas where total cost could be reduced for counter services, however the Town would have to implement changes to realize cost savings.	 2/4
Total Score		2.0

Impact: **High**

- Measuring performance against customer service standards helps to align customer and staff expectations and help to drive performance, which is highly impactful in terms of improving customer service delivery.
- Tracking and reporting on customer service metrics can improve real-time decision-making by understanding what is working well, and what is not working well so the Town can proactively manage customers and staff.




Ease of Implementation: **Medium**

- Developing customer service standards requires an understanding of the customer’s service level expectations to properly align the Town with needs of the public.
- Developing customer service standards is not considered complex, however, this opportunity is highly dependent on IT system capabilities if the Town is to automate data collection and reporting. If automation is preferred, an investment to connect IT systems would be required.
- Generating reports should include data from one integrated source to ensure the data is consistent because different systems capture and report data in different ways.
- Dedicating a resource to oversee the automated data collection and reporting would be required to identify strengths, challenges, and opportunities for improvement.

Implement technology to integrate the Town's existing suite of software and technology.

Description of Opportunity

The Current State Assessment identified that the Town's counter services would benefit from ensuring there is alignment between the customer experience and internal operations. As part of the alignment of customer needs, it was determined that centralizing customer services and information would provide the public with full-service sites that more-fully address the customer's needs. The Town would benefit from having a single-point customer service tool, capable of tracking all customer interactions and ensuring service quality across all departments, accessible from any location. The success of such a system would depend on its integration capability with the existing legacy systems, which are currently relied upon by customer service. Therefore, the Town would benefit from investigating modern automation-technologies that can augment and integrate the existing legacy systems without replacing them. This opens further opportunities for process efficiencies through automation, reduces the burden of change required for staff who may prefer to continue using legacy systems, and reduces the risk involved with the migration of data and processes onto a system that would otherwise replace the legacy systems.

Evaluation Criteria	Description		Impact: High
Improve Customer Service Delivery (weight: 45%)	Centralizing customer services would improve the customer experience by ensuring consistent and convenient service delivery across municipal counter sites. This opportunity would also address customer needs by enabling full-service counters, reducing the need for customers to travel between municipal sites.	 4/4	<ul style="list-style-type: none"> Centralizing customer services would align internal processes with customer needs by providing a "one-stop shop" at counters and would improve the customer's experience as they would not have to travel between municipal sites. Modernizing processes would improve the efficiency of customer service delivery as staff would not have to spend their time on manual and paper-based tasks, which can be easily automated. Increasing the efficiency of staff will also improve the customer experience as staff would be able to service customers more efficiently and effectively.
Increase The Efficiency of Customer Service Delivery (weight: 35%)	Technologies that integrate the Town's existing suite of software/technology would provide efficiencies by automating some tasks and processes, enabling staff to focus on responsibilities specific to their counter service.	 4/4	
Reduce The Total Cost of Counter Services (weight: 20%)	Total costs of counter services would reduce in terms of staff time, as the automation of manual tasks and processes would provide staff with more time to focus on counter-specific responsibilities.	 4/4	
Total Score			Ease of Implementation: Low
			<ul style="list-style-type: none"> Enabling integration of the Town's existing suite of software and technology, and implementing technology to provide a single access point of customer service channels will require a large investment in technology. Implementing potential technology is considered complex because it requires resources, money, time, training, and change management strategies to ensure staff adapt to the new processes.

Improve online, self-service capabilities (e.g. online program registration and payment options) to reduce the volume of in-person counter interactions.

Description of Opportunity

The Current State Assessment identified that the Town would benefit from redesigning counter services to align internal operations with customer needs. Although the Town has a large senior population, the current state review found that there is a recent change in demographics with more young families moving into the area. This influx of younger demographics could increase the demand for greater online capabilities, such as an improved website that would offer program registration, payment options, and improved access to information. Amid the COVID-19 crisis, in-person counter interactions have been restricted, increasing the emphasis on online service capabilities to protect the health and safety of staff and customers.

Evaluation Criteria

Description

Improve Customer Service Delivery
(weight: 45%)

Enhancing online, self-service capabilities would improve customer service delivery for the Town as customers can access information, programs, payments, support, etc. from a more preferred channel. This would also reduce the volume of in-person and over the phone interactions, providing staff with more time to assist customers.



4/4

Increase The Efficiency of Customer Service Delivery
(weight: 35%)

Greater online capabilities could reduce the in-person and over the phone general inquiries which could allow staff to focus their time on responsibilities specific to their department's service desk, resulting in an increased efficiencies for customer service delivery.



4/4

Reduce The Total Cost of Counter Services
(weight: 20%)

Improving online service capabilities would reduce the cost of counter services by reducing the volume of in-person and phone interaction with customers, therefore less staff time and resources are required.



4/4

Total Score 4.00

Impact:

High

- Improving online service capabilities would have a high impact on the Town as there is a high demand from the public to provide these customer service options.
- Providing online service capabilities will help to align internal operations with customer needs as the public will not be required to travel between counter sites to facilitate program registration and payments.
- Increasing online service capabilities amidst the COVID-19 pandemic would help to alleviate health concerns by reducing the need for in-person contact between staff and customers.




Ease of Implementation:

Low

- Implementing online, self-service capabilities would be a complex process as it would require integration of technologies to enable online payments and program registration, which has an associated investment of time, money, and resources.
- Providing online payment capabilities has associated risks such as, transactional errors, maintaining financial controls, and ensuring effective reporting.
- Implementing online service capabilities would require an investment in training and change management that to improve the speed of adoption of the new processes.

Description of Opportunity

Technology, when used effectively, can enhance business operations by providing valuable data insights, by streamlining processes, and by integrating tools to service the needs of customers. Through the Current State Assessment it was identified that rapid technological innovation and constrained budgets are two key trends impacting municipalities across Ontario. With these trends in mind, Wasaga Beach has the opportunity to enhance the digital roadmap and IT strategy for customer services. This will provide a systematic approach to prioritizing and coordinating upcoming technology projects to minimize the amount of resources and funding required while maximizing the benefits for all departments.

Evaluation Criteria	Description		Impact: Medium
Improve Customer Service Delivery (weight: 45%)	Enhancing the digital roadmap and IT strategy would not directly improve customer service delivery because the true benefits of this would be realized through implementation of the strategy.	 1/4	<ul style="list-style-type: none"> Developing a digital roadmap and IT strategy would provide the town with a plan to coordinate and prioritize technology projects to ensure the Town benefits from IT investments. Coordinating future IT system selection could increase the efficiency of customer service delivery with the potential for greater data collection, reporting, and information sharing between software and systems.
Increase The Efficiency of Customer Service Delivery (weight: 35%)	An organization-wide IT strategy for customer service would help to define the guiding principles for software selection, as well as centralize the approvals for selection of software and services. It could also reduce the number of point-solutions implemented therefore reducing the need for manual or paper-driven processes. Fewer disparate systems could result in a more coordinated approach to data collection, thus increasing staff productivity and information sharing capabilities.	 3/4	
Reduce The Total Cost of Counter Services (weight: 20%)	An organization-wide approach to IT for customer service would ensure all software/technologies are compatible across the Town, reducing investments required to integrate solutions. A coordinated and strategic approach to software/technology selection ensures that the cost/benefit of each solution is explored and the compatibility of said solutions with existing systems is considered.	 4/4	
Total Score		2.30	Ease of Implementation: Low <ul style="list-style-type: none"> Developing a digital roadmap and IT strategy is not considered complex however, it requires time to develop and requires stakeholder buy-in. Implementing the strategic plan would be more complex as it would require resources, time, and support from staff and managers to be successful.

An aerial photograph of a residential neighborhood. The top half shows a dense cluster of houses with brown roofs, interspersed with green trees. A river flows through the middle of the scene. The bottom half shows a sandy beach with waves breaking on the shore. A dark, semi-transparent banner is overlaid across the middle of the image, containing the text "Thank You".

Thank You