



The Corporation of the Town of Milton

Report To:	Council
From:	Troy McHarg, Commissioner Corporate Services
Date:	February 28, 2022
Report No:	CORS-013-22
Subject:	Service Delivery Review Updates - Corporate Services
Recommendation:	THAT the Service Delivery Review status updates as outlined in Schedule A in relation to Corporate Services be received for information.

EXECUTIVE SUMMARY

- A Corporate-wide Service Delivery Review (SDR) project has been undertaken in phases with the intent of improving the understanding of services currently provided by the Town and providing better information that allows Council and staff to make informed strategic choices regarding them.
- Phase 2 was presented by Deloitte to Council on December 14, 2020, and included the services provided by the Corporate Services Department. 10 business cases and were endorsed in principle by Council pending further validation and financial and operational analysis prior to implementation.
- A review of the Administrative Penalty System (APS) was also undertaken by MNP and presented on March 2, 2020.
- As outlined in this update report, significant progress has been made with respect to several key software and process improvements including a Human Resources Information System (HRIS), introduction of an APS, and a Council meeting management software.
- Other initiatives continue into 2022 as well, from both a research and an implementation perspective, in areas such as customer relations, IT help desk, property tax administration and work order management.

REPORT

Background

Service delivery review processes were undertaken in 2020 in relation to the Corporate Services Department, resulting in the following two reports that were presented to Council:

- Administrative Penalty System (APS) Review by MNP ([Staff Report CORS-008-20](#))
- Service Delivery Review Phase 2 - Corporate Services by Deloitte (CORS-063-20)



Background

These reviews built upon the previous phase of service delivery review that focused on the Community Services Department, as well as the various service-specific master planning exercises that have been undertaken by the Town.

With respect to APS, Council directed staff to proceed with the implementation of the APS program based on the business case presented. With respect to SDR Phase 2, ten business cases that were included in the final report were endorsed in principle. For these opportunities, further validation through financial and operational analysis was expected along with budget approval, where necessary, prior to implementation. Also included in the final Deloitte report was a listing of other potential opportunities for Town consideration.

A common theme among these business cases and opportunities is the utilization of technology to effect change and improvement in service delivery. Once executed, these new softwares, processes and adjustments are expected to improve service levels to customers, reduce risk, and create capacity to help the organization better support the needs of a growing community.

In accordance with the reporting framework outlined in CORS-055-20, a status update on the progress towards the priority opportunities from the above SDRs is being presented through this report.

Discussion

The goal of the SDR is to improve the understanding of the services currently provided by the Town and provide better information that will allow Council and staff to make informed strategic choices regarding those services. The review looked at current services and their delivery approach, identification of potential changes to service delivery methods and/or service levels and recommendations for changes that improve efficiency and effectiveness.

The 10 business cases presented by Deloitte, along with the APS program outlined by MNP, are listed in the table below. Status updates for each are provided on Schedule A and progress has been made on most of the initiatives. Highlights include:

- The Town officially transitioned to the APS program in February 2022.
- The Town has awarded a contract for an HRIS system to Workday Ltd. and a project team has been assembled. The new software is expected to go live in January 2023.
- A Council meeting management software has been selected with implementation beginning in February 2022.
- Progress and continued research with respect to various other software and process enhancements in areas such as customer relations, IT help desk, property tax administration and work order management.



Discussion

Staff have also made progress on or completed other opportunities also identified in the SDR report which advance:

- Council-Staff Work Plan initiatives (e.g. internal communications audit linked to the People Strategy implementation; comprehensive IT Strategic Plan including a digital service delivery strategy)
- improved workflow processes through automation (e.g. more automated expense management/e-Visa, added project management software use, workflow software in Strategic Communications)
- various administrative improvements (e.g. centralized inventory of Town easements through Teranet, IT security process upgrades).

Table 1: Listing of Business Cases

Business Case Description	Deloitte / MNP Net Financial Impact Assumption
FIN08 - Increase Accounts Payable (AP) automation to create process efficiencies and improve service levels	One-time Cost: \$100,000 - \$250,000 Annual Cost: <\$50,000 Value of efficiency per year: <\$50,000
FIN12 - Create a self-service web-based portal for property tax activity	One-time Cost: \$102,500 - \$152,500 Annual Cost: \$14,765 Value of efficiency per year: \$84,000
FIN13 - Implement a work order system to track Town maintenance activities to facilitate efficient access for insurance claims, Region and Freedom of Information (FOI) request purposes	One-time Cost: \$695,000 - \$710,000 Annual Cost: \$100,000 - \$200,000 Value of efficiency per year: \$20,000
FIN19 - Increase further automation of payroll linked to a new Human Resource Information System (HRIS) or an alternative delivery model	One-time Cost: TBD Annual Cost: \$144,000 - \$288,000 Value of efficiency per year: \$105,000
HR06 - Develop Human Resources (HR) related training and supporting resources for people leaders and explore related learning and development modules within a Human Resource Information System (HRIS) system.	One-time Cost: \$39,000 + T.B.D. Annual Cost: T.B.D. Value of efficiency per year: \$65,000
IT07 - Reassess how the Information Technology (IT) Help Desk provides services	One-time Cost: <\$100,000 Annual Cost: \$0 Value of efficiency per year: \$44,000-\$83,000
LL03 - Revise staffing and service delivery model of Municipal Law Enforcement Officers	One-time Cost: \$0 Annual Cost: \$346,000 - \$481,000



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Discussion

(MLEO), Animal Services Officers and Parking Enforcement Officers	Value of savings per year: \$15,000
LL07 - Pilot a Corporate-wide Customer Relationship Management (CRM) system within one division to develop the foundation for a more comprehensive business case for a CRM system.	One-time Cost: \$500,000 - \$600,000 Annual Cost: \$100,000 - \$120,000 Value of efficiency per year: \$50,000 - \$100,000
LL09 - Implement a Council meeting management software system to streamline and modernize manual/outdated processes related to agenda creation and to improve the end-user experience when accessing Council agendas and related documents	One-time Cost: \$16,150 Annual Cost: \$32,125 Value of efficiency per year: \$35,000 - \$41,000
LL10 - Implement automated plate reading technology for parking enforcement.	One-time Cost: \$100,000 - \$150,000 Annual Cost: T.B.D. Value of efficiency per year: \$50,000 - \$100,000
CORS-008-20 - proceed with the implementation of the Administrative Monetary Penalty System (AMPS)	One-time Cost: \$500,000 Annual Net financial impact: \$100,600 net revenue per year

Financial Impact

The amount of initial and on-going investment required for the business cases varies, from relatively small amounts (examples - IT help desk enhancements, Council Meeting management software, etc.) to more significant investments (examples - HRIS, Work Order Management Software, etc.). It is important to note that the cost estimates provided by the consultants captured external vendor costs, but excluded any internal costs that may be required to execute or maintain the project. These internal resource needs were considered separately in areas such as the Human Resource Implications section of each business case. Estimates were also provided for the value of the potential time saved annually through the introduction of new software or process changes.

The estimated amounts from MNP and Deloitte for each initiative have been identified in the table above. Given that the time required to implement and subsequently assess the results of many of these items spans several years, an update on these estimates is premature at this time. Staff will continue to monitor the costs and benefits related to these items, with any resulting adjustments reflected in the Town's variance and budget processes, as well as in future updates that are specific to the Service Delivery Review processes.



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Respectfully submitted,

Troy McHarg
Commissioner, Corporate Services

For questions, please contact: Troy McHarg, Commissioner, Phone: Ext. 2142
Corporate Services

Attachments

Schedule A - Service Delivery Updates - Corporate Services

CAO Approval
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.



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Schedule A - Service Delivery Updates - Corporate Services

Table 1 - Update on Administrative Penalty System Business Case by MNP (CORS-008-20)

Opportunity/Consultant Recommendation	Analysis/Status Update
To proceed with the implementation of the Administrative Penalty System (APS)	This initiative is completed. Staff proceeded with implementation plans in 2021 and Council adopted the required by-law and related policies on August 23, 2021. Council approved the contract for Hearing Officer services for a pilot period to support the implementation of APS on December 13, 2021. APS “went live” and has been in effect for parking enforcement as of February 1, 2022.

Table 2 - Updates on 10 Business Cases Identified by Deloitte (CORS-063-20)



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Opportunity/Consultant Recommendation	Analysis/Status Update
<p>FIN08 - Increase Accounts Payable (AP) automation to create process efficiencies and improve service levels</p>	<p>Staff are taking an interim step in 2022 by enhancing scanning utilization to ensure the digitalization of all vouchers. Further exploration of automation is expected in 2023 when sufficient resources may be available following completion of the projects noted below and in the Town's 2022 work plan.</p>
<p>FIN12 - Create a self-service web-based portal for property tax activity</p>	<p>Following a Q4 2021 platform update to the Town's taxation system, research is planned for 2022 on a means to enable web-based access to the Tax systems for residents. Research will focus on both expanding functionality within the current platform as well as utilizing third party solutions. The progress of this initiative in 2022 will be dependent on the capabilities of the existing solution and availability of viable third party solutions in the market.</p>
<p>FIN13 - Implement a work order system to track Town maintenance activities to facilitate efficient access for insurance claims, Region and Freedom of Information (FOI) request purposes</p>	<p>In 2021, the cross-functional team including operations, IT and risk management continued work to evaluate system requirements. This included the consideration of potential synergies between the concurrent work order system project and the Automatic Vehicle Location / Global Positioning System (AVL/GPS) project. An RFP in relation to the work order management system is expected to be issued in mid-2022.</p>



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<p>FIN19 - Increase further automation of payroll linked to a new Human Resource Information System (HRIS) or an alternative delivery model</p>	<p>Significant progress has been made with respect to the establishment of the Town's first HRIS system. Milestones include:</p> <ul style="list-style-type: none">• CORS-029-21 Schedule E awarded the proposal for a Human Resource Information System to Workday Ltd. on May 31, 2021• Contracted executed on October 18, 2021• Statement of work executed December 8, 2021• The project team commenced the Workday prepare phase on January 4, 2022• The Town is working towards HR core and payroll going live on January 1, 2023
<p>HR06 - Develop Human Resources (HR) related training and supporting resources for people leaders and explore related learning and development modules within a Human Resource Information System (HRIS) system.</p>	<p>Staff explored the different options available to support the creation of training and supporting resources for people leaders in conjunction with the HRIS vendor selection process. Implementation of the learning module included with the HRIS software is tentatively scheduled for 2023 which will provide learning resources for both people leaders and staff. In the interim, staff are researching and expanding access to training opportunities through existing software and developing process tools to empower people leaders in the areas of recruitment and onboarding to promote consistent and successful onboarding experiences of new and transferring staff.</p>



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<p>IT07 - Reassess how the Information Technology (IT) Help Desk provides services</p>	<p>This initiative is completed. Staff explored the feasibility of utilizing third party resources to assist with the call intake and initial troubleshooting processes. It was determined the financial implications and additional burden placed on internal resources to provide up-to-date knowledge, vendor cross-training and documentation on complex Town systems and processes would negate any perceived benefits of this endeavor. Staff are instead focusing time and effort on expanding internal access to knowledge articles and automated/digital means to promote self-sufficiency relating to IT service tickets. Continued development of knowledge base articles, promotion of the IT Self Service portal, automated email ticket generation, regular “Did you know” communications / postings and internal staff cross-training are all being used to reduce the administrative overhead on IT staff working on and responding to IT requests.</p>
<p>LL03 - Revise staffing and service delivery model of Municipal Law Enforcement Officers (MLEO), Animal Services Officers and Parking Enforcement Officers</p>	<p>1 additional FTE was included in the 2022 Budget. From an overall perspective, the completion of this initiative is dependent on the full FTE complement recommended in the Phase 2 SDR. Further consideration will be given during the 2023 budget process.</p>
<p>LL07 - Pilot a Corporate-wide Customer Relationship Management (CRM) system within one division to develop the foundation for a more comprehensive business case for a CRM system.</p>	<p>As a CRM solution is already in use in Economic Development, the pilot will be led by that division while ensuring corporate needs and requirements are taken into consideration when determining corporate-wide feasibility.</p>



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<p>LL09 - Implement a Council meeting management software system to streamline and modernize manual/outdated processes related to agenda creation and to improve the end-user experience when accessing Council agendas and related documents</p>	<p>Council approved the single source contract with eScribe in 2021 for Council meeting management software. This project is tracking for implementation in May/June 2022 for internal staff modules and public-facing website changes to streamline and automate processes and enhance end-user experience when accessing and viewing Council agendas via the Town website.</p>
<p>LL10 - Implement automated plate reading technology for parking enforcement.</p>	<p>During first year of implementation of the APS program, staff will explore potential opportunities in plate reading technology as part of an overall review of opportunities to expand the APS program.</p>