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Service Delivery Review for the Corporate Services Department

Final Presentation to Council
The Town of Milton
December 14, 2020

MILTON

175
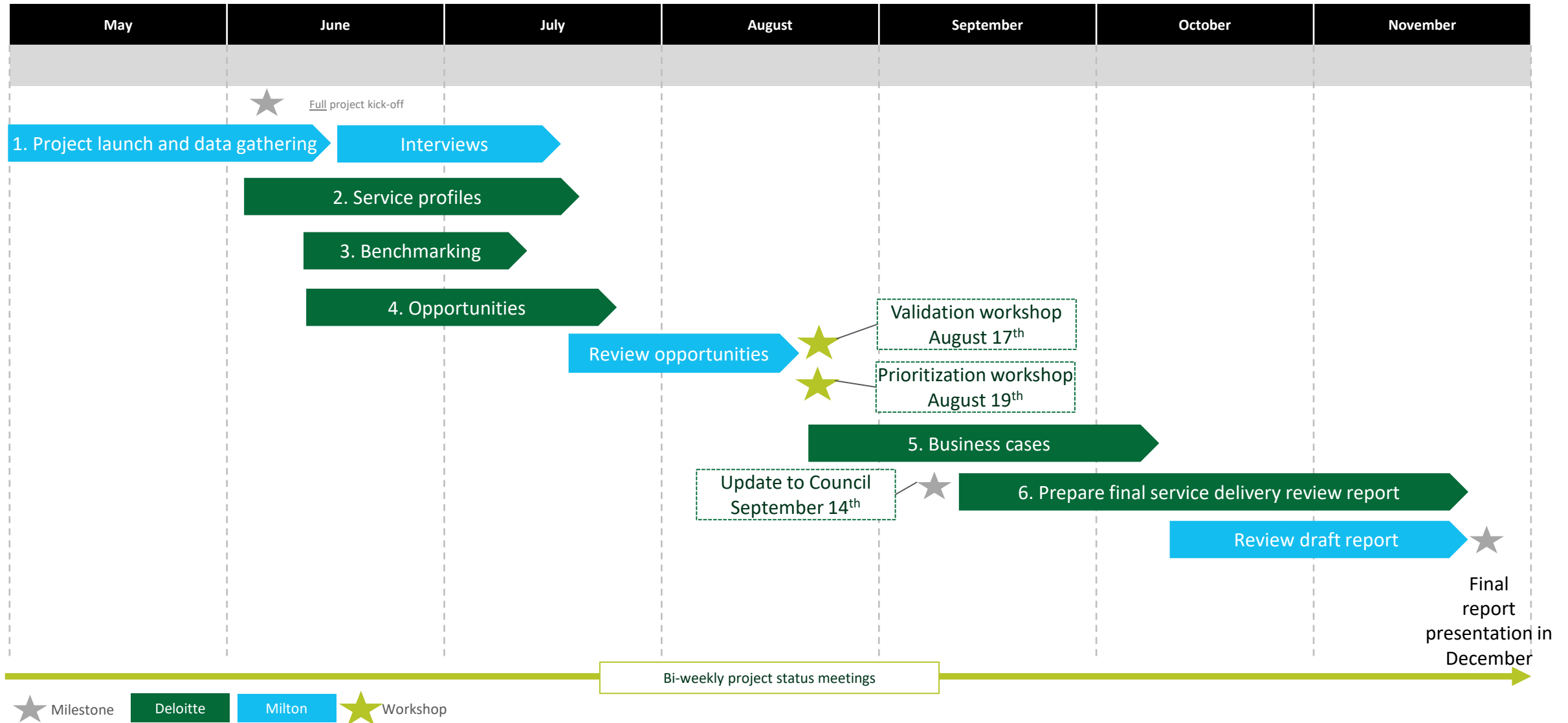
MAKING AN
IMPACT THAT
MATTERS
since 1845

Purpose

Purpose of the meeting

▶ ● Present themes of the Corporate Services Department (CSD) Service Delivery Review

▶ ● Summarize business cases

▶ ● Expected benefits

Engagement timeline

May	June	July	August	September	October	November

★ Full project kick-off

1. Project launch and data gathering → **Interviews**

2. Service profiles

3. Benchmarking

4. Opportunities

Review opportunities ★ — Validation workshop August 17th

★ — Prioritization workshop August 19th

5. Business cases

Update to Council September 14th — ★ **6. Prepare final service delivery review report**

Review draft report ★

Final report presentation in December

Bi-weekly project status meetings

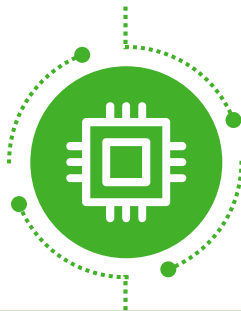★ Milestone ■ Deloitte ■ Milton ★ Workshop

Themes of findings from Service Delivery Review

Meeting the demands of growth

- Town growth of 122% between 2006 and 2018
- Increased demand on Town services and support from CSD

Enabling digitization

- Investments in technology to reduce future costs
- Citizens are starting to expect increased digital services

Process improvements

- Be flexible and agile processes to embrace improvements of technology

Investments in people

- Repurposing time savings to higher value add activities
- Increasing headcount when capacity cannot be generated through technology

Business Cases

Elements of the business cases

▶ Background and context

▶ Business case rationale

▶ Risk assessment and response strategy

▶ Human resources implications

▶ Cost and funding requirements /implications

▶ Change management considerations

Service Delivery Review Phase 2 – Corporate Services | Appendix A – Business Cases

Town of Milton Business Case (FIN08)

Increase Accounts Payable (AP) automation to create process efficiencies and improve service levels

Background and Context
Current state analysis

The Accounting sub-division is responsible for the Accounts Payable (AP) function, including payments made to vendors of the Town. Annual transactions include over 6,000 vouchers, over 4,000 utility bills, around 500 AP/Visa adjustments as well as between 13,000 and 20,000 Visa transactions. Between the various payment types such as Electronic Funds Transfer (EFT), wires and cheques there are around 8,000 payments made. Currently, the AP process is very manual in nature and is reliant on hard copy records. This has created inefficiencies within the organization, specifically creating additional time and effort required to process and track payments and respond to inquiries from vendors and staff, in addition to record-keeping requirements.

The Town is upgrading the Town's Enterprise Resource Planning (ERP) software to a more recent version. This version may provide electronic workflow and imaging. RPA can be an integrated component to any ERP to enable AP automation in invoice entry within the ERP system. AP automation through RPA should be factored into the overall ERP upgrade implementation.

During the upgrade process, the Town intends to review the intake process for invoicing in order to move to electronic formats where feasible.

The need for electronic workflow was initially identified through an independent Procurement to Pay review and Accounts Payable business process review during the financial year-end audit.

The volume in Accounts Payable processing continues to increase as the Town grows. Over time, there have been many changes within AP on how payments are processed. Please see below for examples of AP growth within the Town.
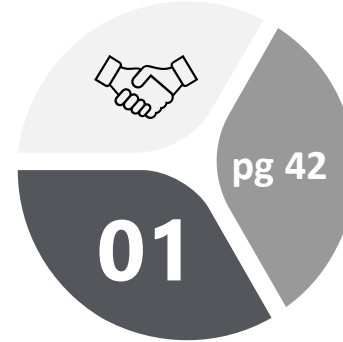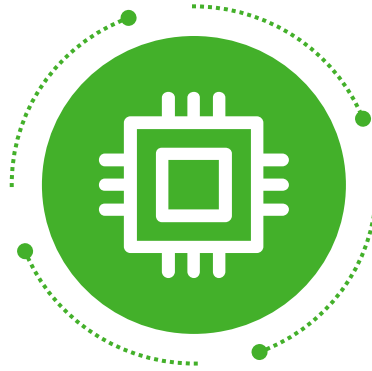
The number of invoices paid over the last 3 years has seen growth of:
- 2019 – 1%
- 2018 – 5%
- 2017 – 3%

However, the Visa program has grown drastically over the years. AP plays a key role with importing, balancing and reconciling this data. The biggest time investment comes with auditing each transaction for tax compliance (proper tax
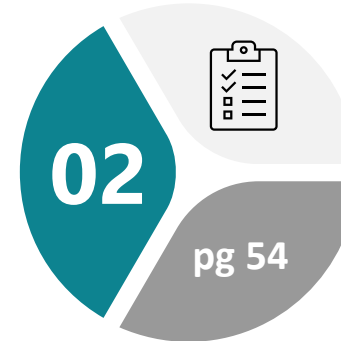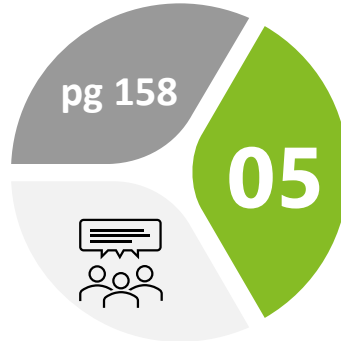
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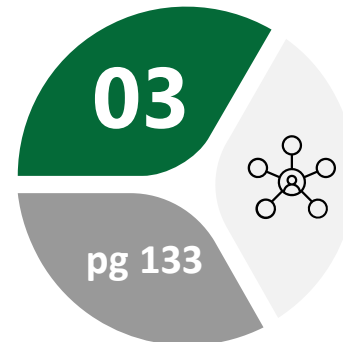
Business Cases

Enabling digitization

Increase Accounts Payable (AP) automation to create process efficiencies and improve service levels

01 — pg 42

Create a Self-Service Web Based Portal for property tax activity

02 — pg 54

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

03 — pg 133

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
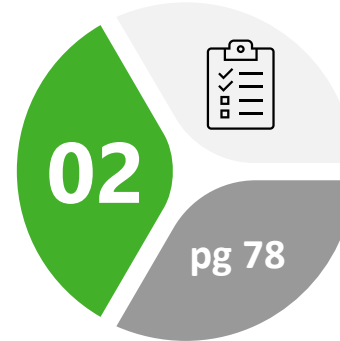
04 — pg 143

Implement automated plate reading technology for parking enforcement

05 — pg 158

Business Cases

Process improvements

01   pg 65
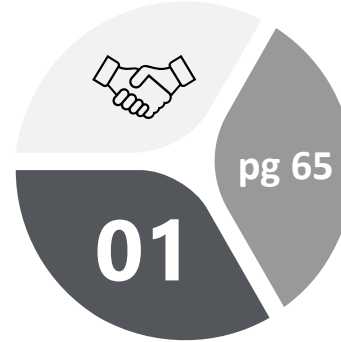
Implement a work order system to track Town maintenance activities to facilitate efficient access for insurance claims, Region and Freedom of Information (FOI) request purposes

02   pg 78

Explore further automation of payroll linked to a new Human Resource Information System (HRIS) or an alternative delivery model
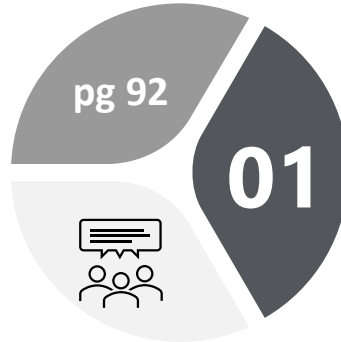
03   pg 103
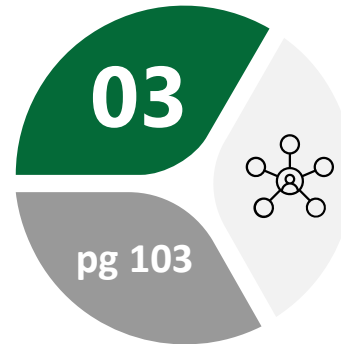
Reassess how the Information Technology (IT) Help Desk provides services
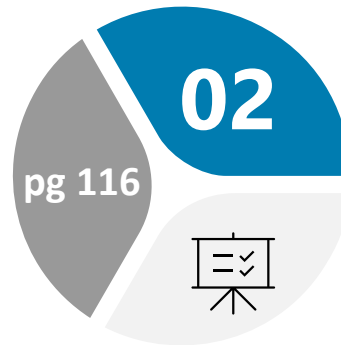
Business Cases

Investments in people

Develop Human Resources (HR) related training and supporting resources for people leaders and explore related learning and development modules within an HRIS system

pg 92

01

Revise staffing and service delivery model of Municipal Law Enforcement Officers (MLEO), Animal Services Officers and Parking Enforcement Officers

02

pg 116

Service Delivery Review Outcomes

1 Management was provided with 53 opportunities, and 10 detailed business cases

2 Implementation plan and details required

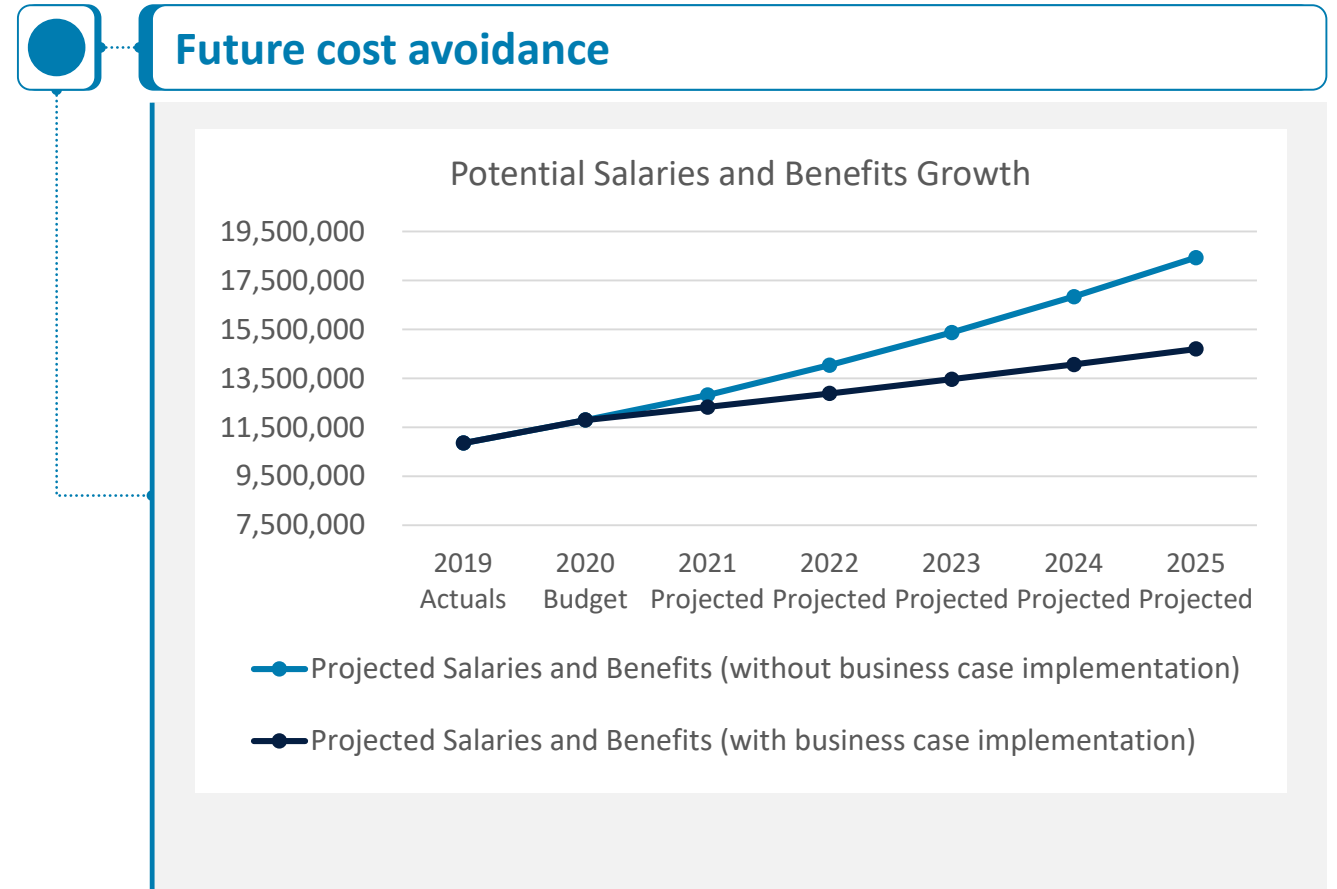**3** Investments and changes to on-going cost structure

Expected benefits

Repurposed Staff Time

Estimated combined time savings to be repurposed to deal with future growth is approximately 7,900 to 11,250 hours of staff time.

Improved Service Levels

- Automated services
- Focus on higher value add activities

Future cost avoidance

Potential Salaries and Benefits Growth

Legend:
- Projected Salaries and Benefits (without business case implementation)
- Projected Salaries and Benefits (with business case implementation)

X-axis: 2019 Actuals, 2020 Budget, 2021 Projected, 2022 Projected, 2023 Projected, 2024 Projected, 2025 Projected

Y-axis: 7,500,000 / 9,500,000 / 11,500,000 / 13,500,000 / 15,500,000 / 17,500,000 / 19,500,000

Questions

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