



Niagara-on-the-Lake

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6-Month CAO Update

August 30, 2021

Agenda

- Overview
- CAO Work plan
- 6-Month Achievements
- Modernization Efforts
- Grant Funding
- Where are we Going Next?
- Conclusion and Questions



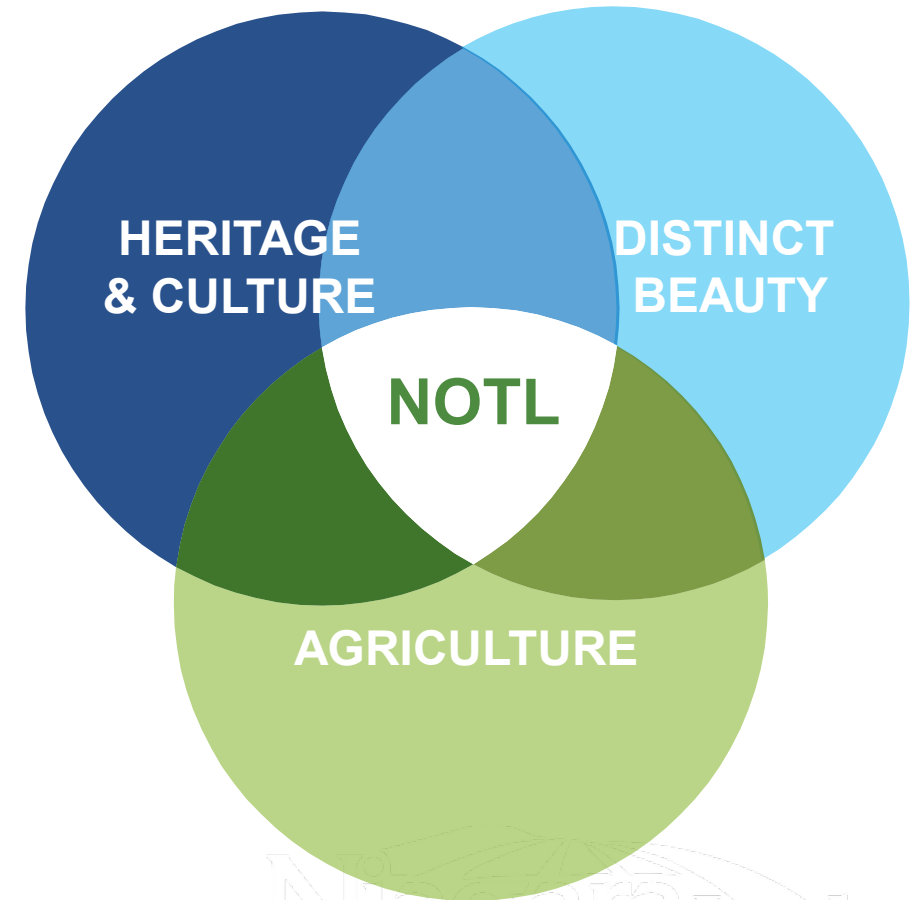
CAO 6-Month Update



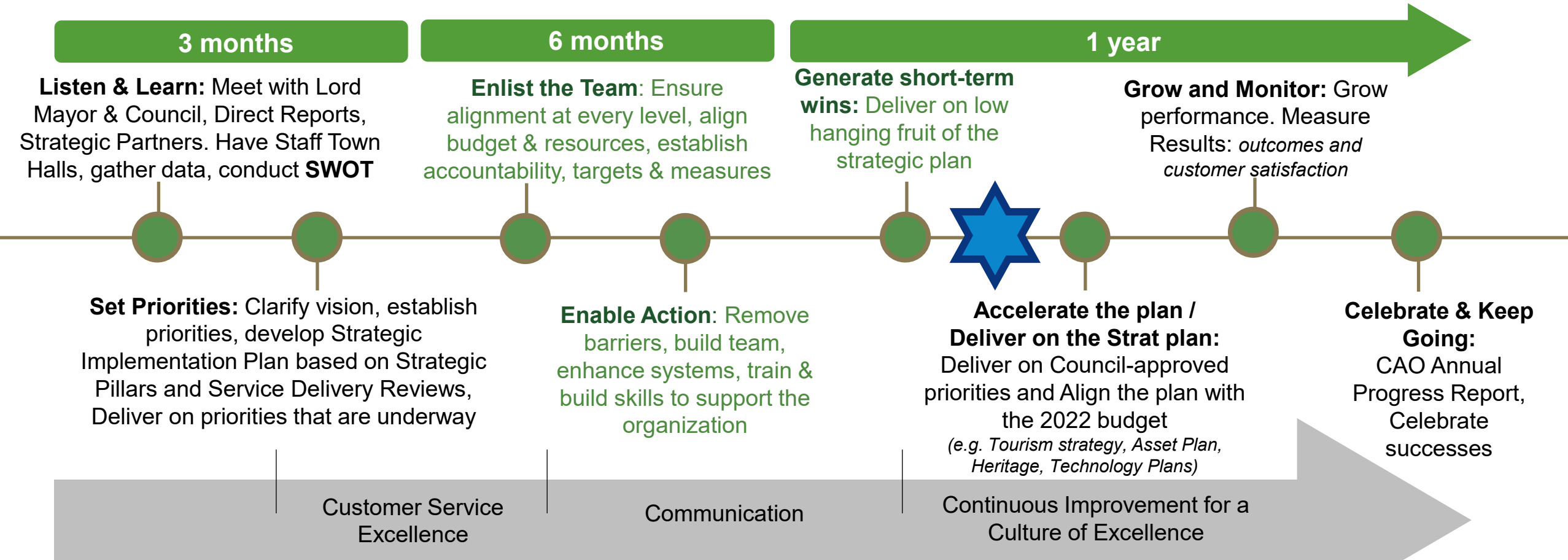
Overview

Niagara-on-the-Lake

- Niagara-on-the-Lake is one of Canada's most historic and picturesque towns.
- It has an engaged and active community.
- It has a dedicated workforce at the Town.
- The Town has a distinct character & foundation of:
 - **Natural Beauty,**
 - **Heritage and Culture,** and
 - **Agriculture.**



CAO Work Plan: 3 months, 6 months, 12 months



CAO Work Plan: The first 3 months - Recap

the first 3 MONTHS PLAN

ITEM	DESCRIPTION	ACTIONS
1	Listen & Learn: Check in with Council and the Niagara-on-the-Lake Team and Review Organizational Data	<ul style="list-style-type: none">• Meet with the Lord Mayor & Council to understand priorities and relevant initiatives• Meet with senior leaders and NOTL staff• Meet with Committees• Meet with Partners, Community Groups & Members
2	Review Organizational Data	<ul style="list-style-type: none">• Review data <i>Strategic Plan, Service Delivery Review, Master Plans, Surveys, Budget, Org Charts</i>• Identify top organizational priorities• Determine current conditions, what we are working on, status, and other projects that require focus• Determine how best to support Council
3	Set Priorities	<ul style="list-style-type: none">• Analyze Current Conditions (Internal SWOT)• Identify 'quick wins' to build momentum• Prioritization Workshops (SDR and Strategic Plan)
4	Plan short-term actions, Deliver on current priorities, Identify Needs, Determine Next Steps	<ul style="list-style-type: none">• Take action on high priorities.• Plan for 6 months & 1 year.• Establish Strategic Execution Plan• Determine Needs (People, Structure, Process, \$)• Set deadlines. Establish metrics/KPIs

CAO Workplan: 3-month Status Recap

1. LISTEN & LEARN MEETINGS



2. REVIEW ORG. DATA



3. SET PRIORITIES



4. PLAN ACTIONS / NEXT STEPS



CAO Work Plan: 6-month Status Update

the first
6 MONTHS
PLAN

ITEM	DESCRIPTION	ACTIONS
1	Check in	<ul style="list-style-type: none">Review findings from first 3 months & plan accordingly
2	Advance Priorities	<ul style="list-style-type: none">Ensure alignment of priorities at all levelsEnsure budget alignment and approvalEnsure resource alignmentEnsure effective 2-way communication
3	Actions and next steps	<ul style="list-style-type: none">Deliver and build on quick winsMove to medium-term and long-term planningDocument Strategic Plan Execution
4	Determine and Monitor Deliverables	<ul style="list-style-type: none">Analyze current results using metricsPlan & take action. Plan for 1 year and beyond.Develop monitoring reporting framework for Strat Plan.
5	Prioritize Development Needs and Develop	<ul style="list-style-type: none">Prioritize organizational changes required and make modifications as needed (ensure right people in right spots, develop people skills and competencies, align structure, systems and resources)

CAO Workplan: 6-month Status Update

1. Check-in on the first 3 months

- Review findings from the first three months - **COMPLETE**

2. Advance Priorities

- Ensure Priorities Alignment
 - Ensure Budget Alignment
 - Ensure Resource Alignment
 - Ensure effective 2-way Communications
- ONGOING**

3. PLAN ACTIONS / NEXT STEPS

- Deliver and build on quick wins - **COMPLETE**
- Move to medium & long-term planning - **COMPLETE**
- Document Strategic Plan Execution – **COMPLETE / IN PROGRESS**

CAO Workplan: 6-month Status Update

4. Determine and Monitor Deliverables



- Analyze Results - **ONGOING**
- Plan & Take Action – **IN PROGRESS**
- Develop monitoring reporting framework for Strat Plan – **IN PROGRESS**

5. PRIORITIZE DEVELOPMENT NEEDS



- Prioritize organizational changes required and make modifications as needed (*ensure the right organizational structure, the right people are in the right spots, develop people, skills and competencies, align structure, systems and resources*) - **COMPLETE**

CAO Workplan: Strategic Plan and SDR

A key activity has been completing prioritization workshops including:

Strategic Plan Prioritization Workshop



Service Delivery Review Prioritization Workshop



6-Month Achievements

TEAMWORK
MOTIVATION
INSPIRATION
LEADERSHIP
VISION
+ INNOVATION

SUCCESS



Fire and Emergency Services



Community & Development Services



Operations



Corporate Services



CAO Office: Customer Experience and Communications, HR and Procurement



Modernization & Customer-Centric Focus



CS-21-004 – Municipal Modernization Program

- Report **CS-21-004** was approved by Council in March 2021 to allocate the **one-time Modernization Funding** received from the Province.
- Recommended allocation of the remaining funds toward smarter, more efficient, modernized service delivery improvements are broken into 3 categories:

Service Improvement Opportunity
1. People Opportunities
2. Process Opportunities
3. Technology Opportunities

- The recommendations aligned with the recommendations from the **Service Delivery Review** and/or **Council's 2018 – 2022 Strategic Plan**.

1. People Opportunities

NOT
STARTED

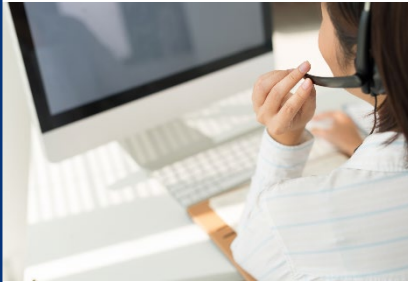
25%
COMPLETE

50%
COMPLETE

75%
COMPLETE

100%
COMPLETE

Manager of CEC



CAO – CEC

COMPLETED:
July 26, 2021

100% COMPLETE

Fire Administrator



Fire & Emergency
Services

COMPLETED:
April 2021

100% COMPLETE

Procurement Officer



CAO –
HR/Procurement

COMPLETED:
August 9, 2021

100% COMPLETE

By-law Officer



C&DS

COMPLETED:
August 9, 2021

100% COMPLETE

2. Process Opportunities

NOT
STARTED

25%
COMPLETE

50%
COMPLETE

75%
COMPLETE

100%
COMPLETE

AMPS



- ✓ Council approved concept of AMPS in June 2021
- ✓ Reporting & By-laws to Council August 30



DEADLINE:
Dec 2021

75% COMPLETE

Online Forms: *Parking Ticket Screening Tool*



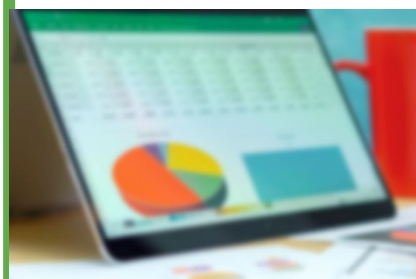
- ✓ Online forms – a digitization initiative to streamline processes
- ✓ Parking Ticket Screening Tool & Animal Licencing Form



DEADLINE:
August 2021

100 %COMPLETE

Asset Management Plan



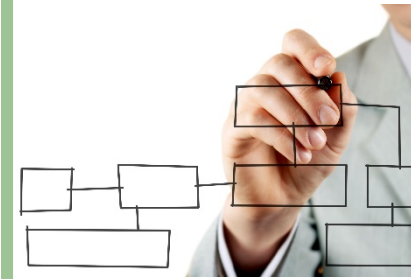
- ✓ Online form available instead of paper copies
- ✓ Streamlined process



DEADLINE:
July 1, 2022

25% COMPLETE

Lean Process Review



- ✓ To commence following hire of the Manager of Customer Experience & Communications



DEADLINE:
TBD

NOT STARTED

KPIs



- ✓ Phase 1 – Deloitte final report under review
- ✓ Phase 2 – with Manager of CEC





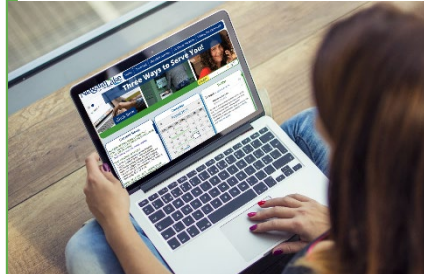







DEADLINE:
July 2021

75% COMPLETE

3. Tech. Opportunities

NOT STARTED	25% COMPLETE	50% COMPLETE	75% COMPLETE	100% COMPLETE
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<p>Questica</p>  <ul style="list-style-type: none"> ✓ New budgeting software - implementation phase ✓ Training has commenced ✓ System integration & scheduling issues <p> DEADLINE: September 30, 2021</p> <p>75 % COMPLETE</p>	<p>e-SCRIBE</p>  <ul style="list-style-type: none"> ✓ IT and Clerks undergoing training & implementation ✓ Forms & workflow ✓ Council engagement is the next step <p> DEADLINE: November 1, 2021</p> <p>50 % COMPLETE</p>	<p>Website</p>  <ul style="list-style-type: none"> ✓ RFP closed & evaluated ✓ Next step: Report to Council for August 30 to award the contract <p> DEADLINE: December 5, 2021</p> <p>25 % COMPLETE</p>	<p>Fire Business Intelligence Software</p>  <ul style="list-style-type: none"> ✓ Able to pay for program for 3 years with the funding allocation ✓ Limited staff resources for training <p> DEADLINE: November 1, 2021</p> <p>75 % COMPLETE</p>	<p>Honk Mobile</p>  <ul style="list-style-type: none"> ✓ COMPLETED: July 5, 2021 <p> COMPLETED: July 5, 2021</p> <p>100 %COMPLETE</p>
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Focus Areas: Customer Centric

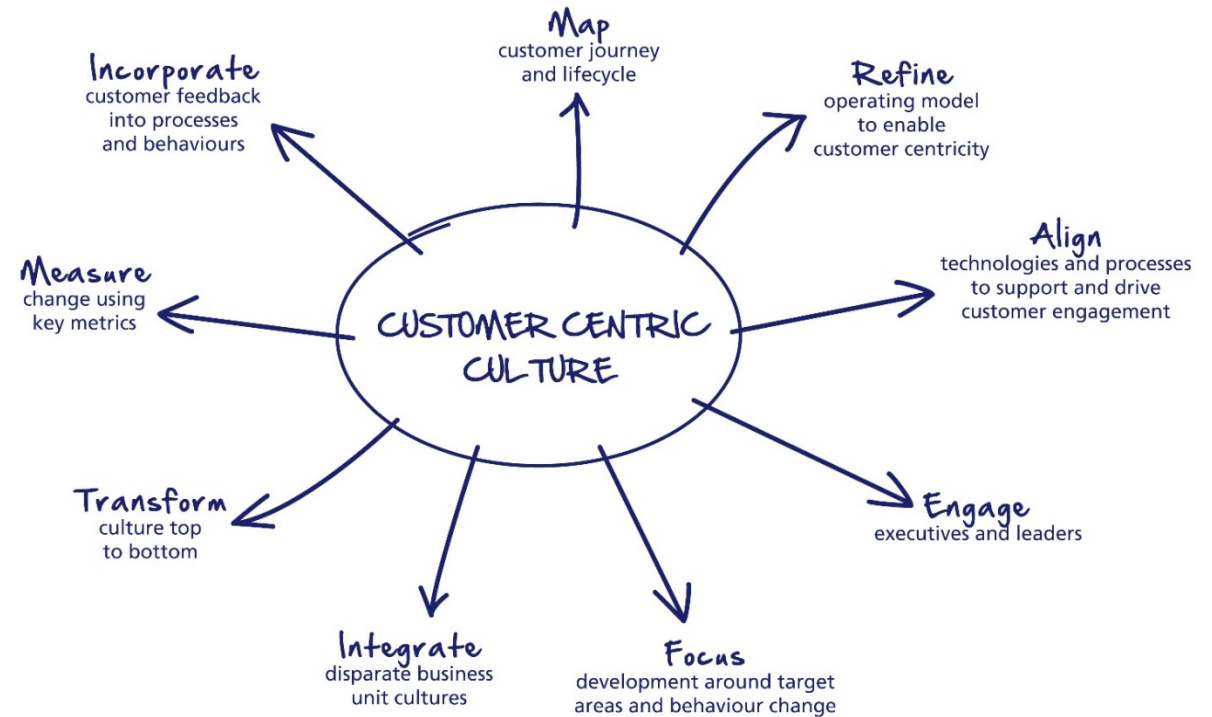
Communication



Customer Service

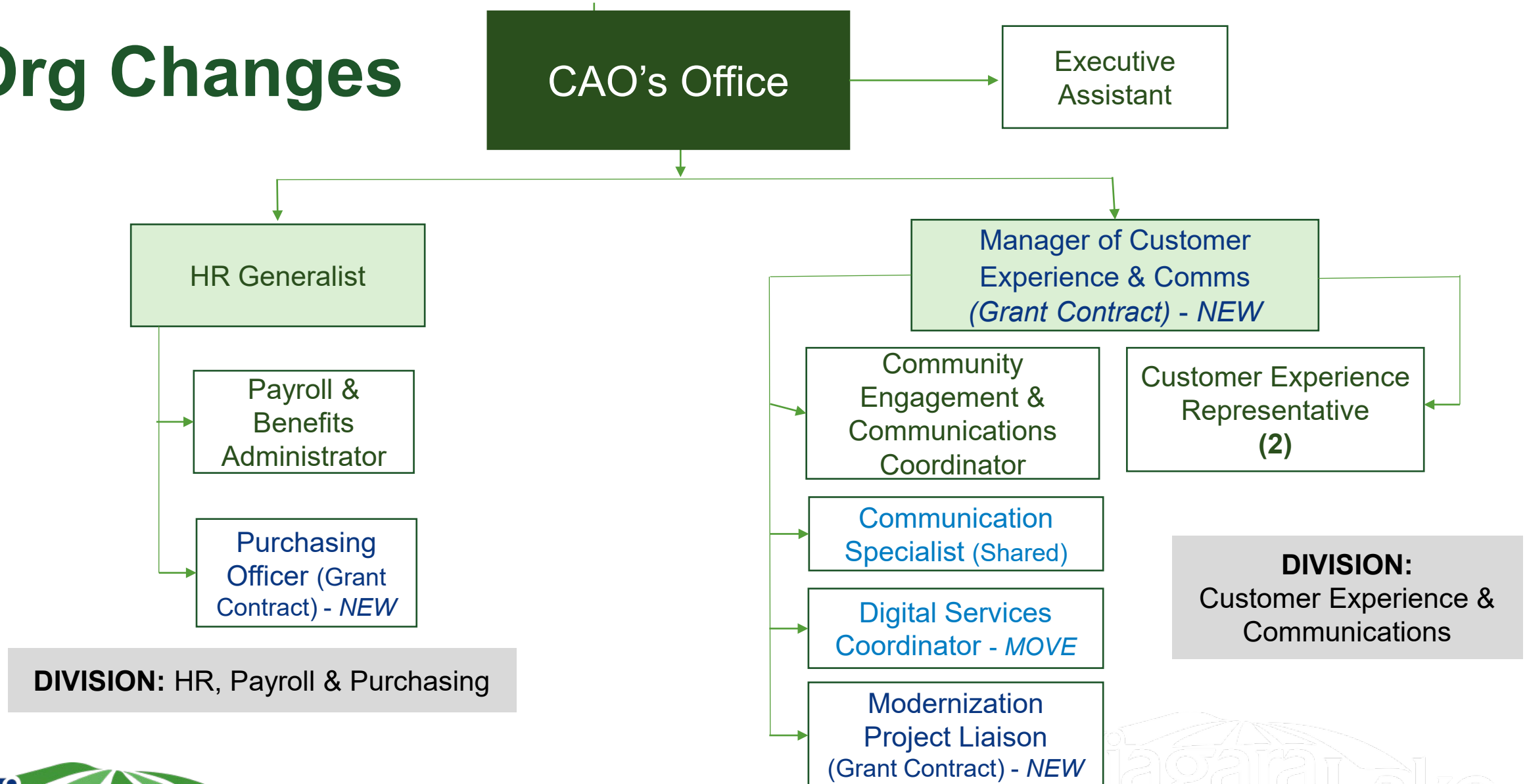


Continuous Improvement



Culture of Excellence

Org Changes



Strategic Plan, Service Delivery Review, and Outstanding Council Business



NOTL: Strategic Plan

Strategic Plan Approval

On February 24, 2020, Council approved Report CAO-20-002 – 2018-2022 Council's Strategic Plan, *as amended*.

Strategic Plan Summary

- Council's Strategic Plan consists of **5 pillars**:



Each pillar has 3 main objectives, and several supporting tactics and action items identified.

TOTAL NUMBERS:

Pillars: 5
Objectives: 25
Tactics: 23
Action Items: 41
Indicators of Success: 15

NOTL: Service Delivery Review & Follow-up

Service Delivery Review Approval

- On December 9, 2019, Council approved the award of the contract for the Service Delivery Review (“SDR or the “Review”) to Deloitte.

Service Delivery Review Summary

- In June 2020, the Service Delivery Review was completed and presented at Council.
- The project objectives included: *enhancing fiscal responsibility, transparency, and ongoing fiscal sustainability; improvements to processes that drive service delivery modernization, efficiency and cost effectiveness; better use and integration of existing and new technologies; and service level improvements that best meet the needs of residents.*
- In March 2021, Deloitte supported the Town in facilitating a workshop and reprioritization exercise where Senior Management participated in realigning implementation goals to the end of 2022, with consideration given to the impact of COVID-19 and other ongoing priorities (such as the Strategic Plan, Outstanding Council Business List and day-to-day work)
- The Service Delivery Review and Workshop identified themes and opportunities.

TOTAL NUMBERS:

Themes: 10
Improvement Opportunities: 42



Grant Funding



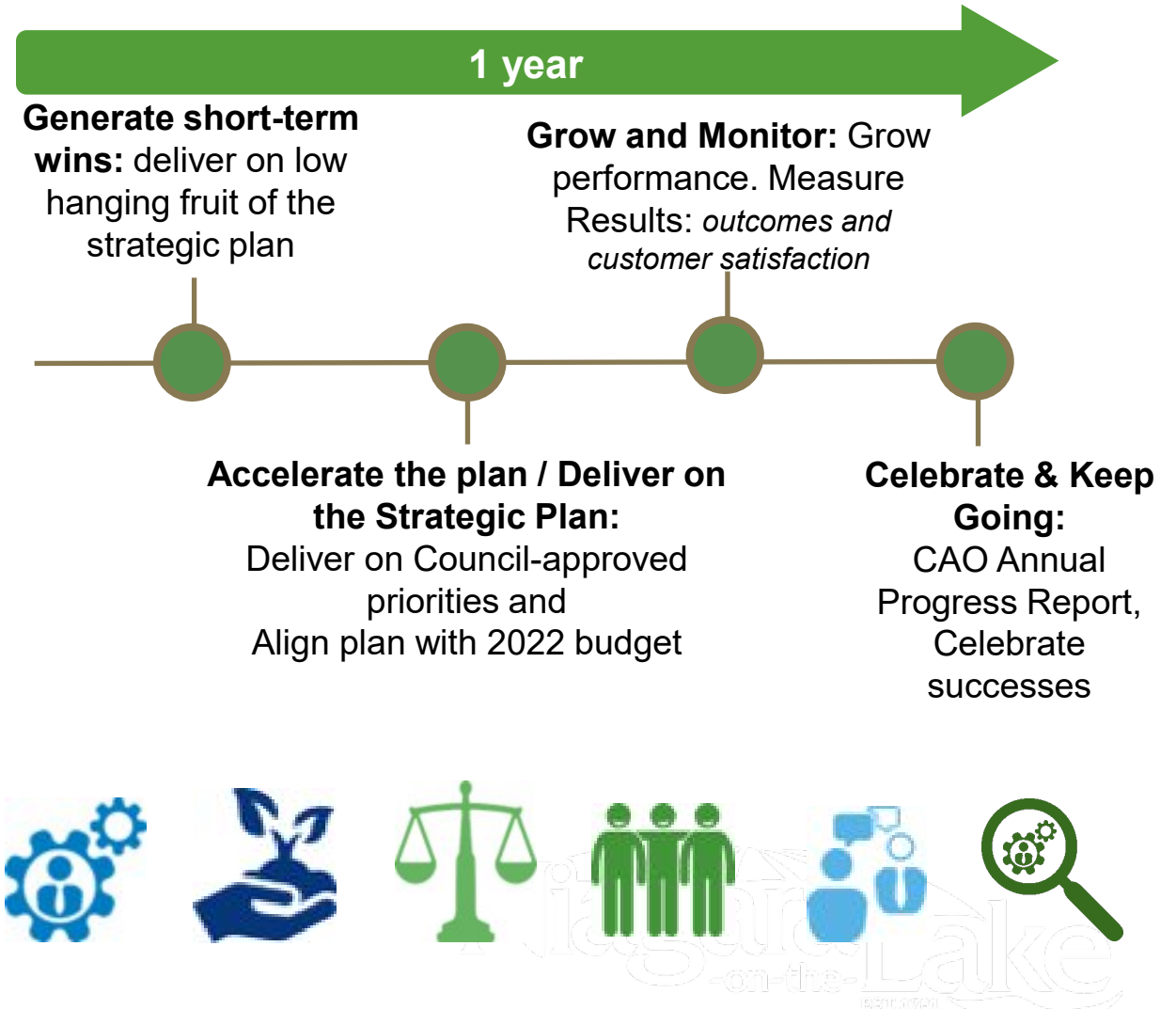
Where are we Going Next?



Where are we Going?

Focus on the initiatives that:

- Advance the Vision and Strategic Priorities of the Town
- Have long-term positive impact on the community and preserve the unique character of NOTL
- Enhance customer experience



Where are we Going?

KEY INITIATIVES to advance NOTL Council strategic priorities in 2021 (*Examples*):

- **Planning Workshop & Action Items**
- **Heritage Expansion Study**
- **Tourism Strategy**
- **Former Hospital Site Initiative**
- **Transportation Master Plan**



Where are we Going?

KEY INITIATIVES to advance NOTL Council strategic priorities in 2021 (*Examples*):

- **Advance Service Delivery Initiatives** (e.g. Website)
- **Develop a Framework towards a Sustainable Budget**
- **Also, ensure Environmental Stewardship in Decision Making** (e.g. Niagara Adapts)



Where are we Going?

PARTNERSHIP INITIATIVES in progress in 2021:

- Niagara District Airport RFP
- Transit
- Niagara Shores Park





*If you don't know
where you are going
any road will get you
there – Lewis Carroll*

*A Vision without a
Strategy remains an
illusion –
Lee Bolman*



**Thank you.
Any Questions?**