



BRACEBRIDGE
The Heart of Muskoka

Organizational and Service Delivery Review

→ Final Recommendations Report

Updated: November 21, 2024



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1.0 Executive Summary

Optimus SBR was engaged by the Town of Bracebridge (“The Town”) to conduct an organizational and service delivery review that will provide recommendations to enhance the structure and optimize the provision of services for the Bracebridge community.

This report builds on a previously provided Current State Summary and focuses on recommendations for future state improvements. The recommendations have been developed to address key challenges identified during an analysis of current state operations and refined through discussions with the Town's Leadership Team. The six primary recommendations focus on updating existing processes, enhancing efficiency, and aligning operations with best practices.

Recommendations for the Town include:

- 1 Complete Procurement Policy Refresh Project:** The Town should prioritize updating its procurement policy to align with modern requirements, including the incorporation of , vendors of record and green procurement practices. This will streamline procurement processes, increase efficiency, and ensure compliance with legislative and leading practices.
- 2 Refreshed Special Event Permit Processes:** The Town should revamp its special event permit process by assigning coordination duties to a designated staff member and establishing a Special Event Working Group. This will improve interdepartmental coordination, reduce last-minute challenges, and enhance customer service for event organizers.
- 3 Targeted Organizational Structure Changes:** To support continuous growth, the report recommends creating two new positions—a Climate Change Specialist; and an Executive Assistant under the CAO's office—and exploring the realignment of the payroll and benefits functions. These changes aim to better distribute workloads and enhance organizational capacity for future growth.
- 4 Defining Customer Experience for the Town:** Developing a Customer Experience Strategy would standardize service delivery across departments, improve customer interactions, and ensure consistency in service quality. The strategy would also provide training and performance metrics to measure customer satisfaction and improve service efficiency.
- 5 Review and Implement Technology for Operations Teams:** The Town should assess and implement technology solutions for operations teams (e.g., Public Works, Bylaw) to reduce reliance on paper-based systems and increase efficiency. This will streamline workflows, enhance data accessibility, and improve field operations.
- 6 Refresh and Formalize Corporate Performance Indicators:** The Town should reinvigorate its use of corporate performance indicators by linking them to the Strategic Plan, Council priorities, and operational goals. This will improve reporting, provide clearer insights into performance, and support data-driven decision-making.

2.0 Project Overview

2.1 Project Context

The Town of Bracebridge has been undergoing a period of population growth over the past 5 years, particularly related to an increase in year-round residents. This has created challenges for the Town to ensure that service delivery is maintained, while balancing staffing and fiscal constraints. With the consistent vision of providing its residents with a great community experience and strong economic opportunities, the Town is seeking to identify opportunities to improve its structure and service provision.

The Town partnered with Optimus SBR, a management consultancy in Ontario, to undertake an Organizational and Service Delivery Review. The Optimus SBR team was tasked with taking an organization-wide view of the various departments and activities in Bracebridge to provide independent third-party advice and recommendations to prioritize where the Town should invest in its staffing structure, as well as to identify opportunities to change service delivery models to ensure efficient and effective service delivery to the Bracebridge community.

2.2 Project Mission and Success

The project Mission and Success Factors were set at the beginning of the project, and were discussed and approved at the Kick-Off, and at the Discovery Update meeting.

The purpose of the Mission is to give a clear direction to the goal and intent of the project. Success Factors are designed to provide the intangible elements that will determine if this project has achieved its goals. These go beyond specific deliverables, but rather focus on what the Town will have or experience once the project concludes.

Both the Mission and Success Factors are included in all interim deliverables and are consistently re-shared throughout the project to ensure there is a reminder of the project's core objectives and what we are aiming to achieve.

2.2.1 Project Mission

The Mission was defined as:

- To conduct an organizational and service delivery review that will provide recommendations to enhance the structure and optimize the provision of services for the Bracebridge community.

2.2.2 Project Success

Success Factors included:

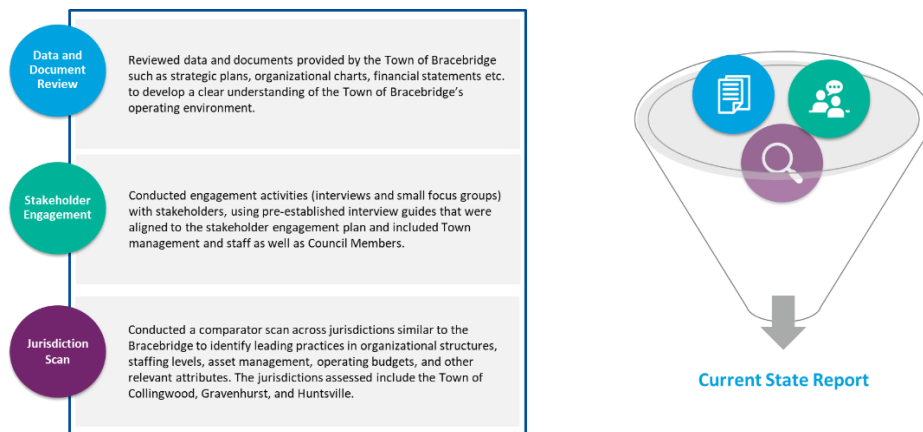
- Realistic, execution-focused recommendations that will improve service delivery for Bracebridge staff, to improve workflows and the resident experience.
- Identification of preliminary areas of focus for next fiscal year's budget to potentially improve service delivery and recommend adequate staffing.
- An understanding of Bracebridge's alignment to leading practices.
- Stakeholder buy-in and confidence that project recommendations and next steps will position Bracebridge well on its continuous improvement journey.

2.3 Project Approach and Deliverables

At the outset of this project, the Optimus SBR team worked with the Town to define the approach that would be undertaken for the project. Specifically, the following set of activities was agreed upon to achieve the completion of the Project Mission, and support the achievement of the Project Success, as defined above.

- Step 1: Project Launch and Discovery
- Step 2: Environmental Scan, Benchmarking, and Environment Overview
- Step 3: Review of Current Service Delivery Model
- Step 4: Review of Current State Organizational Structure and Staffing Levels
- **Step 5: Develop Recommendations**
- Step 6: Final Presentation and Closeout

The Optimus SBR team used the following information gathering activities to gain an understanding of the current state and to inform the development of future state recommendations. It should be noted that no findings in the current state were based on a single comment via stakeholder engagement or a single finding in any data/documents provided. Rather, the process was designed such that a theme would need to be found multiple times, through multiple sources (e.g., multiple interviews, document review and interview findings, etc.) to be included in the current state findings for this work.



This approach was designed to provide the following core deliverables:

- **Project Plan:** To define the workflow and organize activities of the project.
- **Research and Engagement Plan:** Outlining the objectives of the review, and the modalities for research and engagement of staff to drive the project forward.
- **Current State Report:** An overview of the findings through research, engagement, and analysis of the current state. Designed to identify the core strengths and challenges for the Town as it exists today.
- **Final Recommendation Report:** Defining the recommended activities for the future to close existing challenges and drive enhanced service delivery.

2.4 Purpose of this Document

This document is the Final Recommendation Report. This Report consolidates and abbreviates findings from the Current State Report to set the context for readers, prior to moving towards specific recommendations to enhance the provision of service delivery as well as specific organizational structures. The Report addresses feedback and comments from an earlier Draft Recommendation Report that was shared with the Town.

This document is not intended to provide a comprehensive overview of the entire current state, nor is it designed to provide all detail learned throughout the engagement and research phases.

Rather, this document is designed to provide insights into what overarching challenges exist and the specific recommendations that will address these areas of opportunity. Each recommendation will outline unique challenges in the current state this will help to address, as well as how the recommendation can be implemented. Once all recommendations are presented, an overview of broader implementation planning is provided to support the Town of Bracebridge as it moves forward with execution against these recommendations.

2.4.1 Scope and Limitations of this Document and Project

This project was designed to provide a high-level review of the various departments within the Town, including specific services they provide and where targeted enhancements would be required to support more efficient and effective operations. The scope of the project was not to conduct detailed or deep dive reviews into every and/or any department or service provided.

The Optimus SBR team has taken the information and feedback provided by the Town into consideration, however, there are limitations to the level and weight that this content can provide. In particular, multiple service-specific or detailed reviews have been conducted by the Town (i.e., a line-by-line budget review in Finance, a modernization review in Planning and Development). Some of these (such as the Planning and Development review) were provided to and reviewed by the Optimus SBR to understand structures, challenges, and suggested next steps; which were discussed with relevant Town stakeholders.

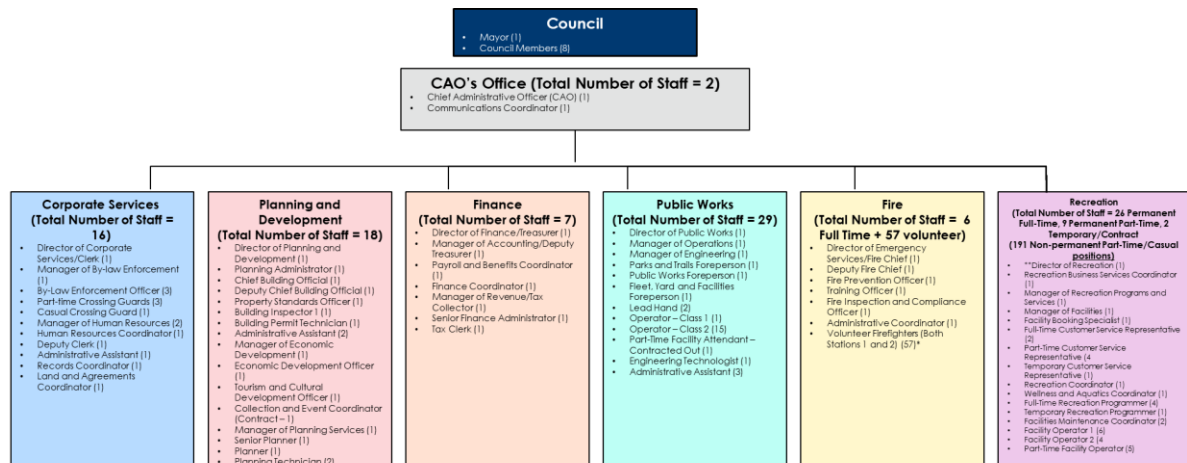
This review and this report are designed to be an input for the Town as it continues its path of continuous improvement. While there are detailed reviews in place, this review should be seen as a complementary suite of findings and recommendations. This is not designed to supersede or replace the detailed reviews that have been completed in the past. As such, the recommendations contained in this report, will have varying levels of detail based on the content provided by the Town, and should be reviewed and considered by the Town, but should be implemented in a manner that works with and supports other ongoing work.

3.0 Current State Overview

This project was designed to be a high-level review of the overarching structures and services provided by the Town of Bracebridge. Below are themes that emerged through this review that apply broadly to the Corporation. It is understood that some items listed below may be more or less applicable to every department, and that it is not an even application.

3.1 Organizational Structure

The Town has a total of 247 staff, including full-time, part-time, temporary/contract, non-permanent part-time/casual, and volunteers. The breakdown of staff across the seven departments is depicted in the graphic below.



Note: A detailed overview of services provided by the Departments is included further in the report. All staff titles and counts are based on updated Bracebridge HR data provided on February 19, 2024.

Figure 1: Organizational chart as of February 19, 2024

3.2 Strengths Associated with Bracebridge's Current State

After engaging with staff and leadership, the following major themes were identified as core strengths that should be preserved and built upon as the Town continues to grow.

3.2.1 Staff are Collaborative and Knowledgeable

The majority of employees have indicated that the Town is a desirable place to work. While some employees experience challenges with interdepartmental collaboration (See Section 3.3.1 below), there is a desire among employees to strive for a more cohesive and collaborative organization. Furthermore, staff are regularly provided opportunities to upskill and grow their abilities.

An example of staff building community with one another includes the Management Team, who has organized meetings that happen on a quarterly basis. The goal is to network with colleagues in other departments, develop relationships, and jointly address cross-departmental challenges.

3.2.2 Proactively Planning for the Future

Throughout consultations, leadership and staff all made mention of plans they are working through now to support enhanced future state delivery. Examples include reviews of existing organizational charts, development of new infrastructure, like the Muskoka Lumber Community Centre, or identifying process/policy changes for the near and long-term future.

3.2.3 Supportive Council

The Town benefits from a supportive Council that fosters a respectful and collaborative environment among staff members. The Council's clarity in setting a strategic direction for the Town, as evidenced by documents such as the Council Priorities, facilitates a unified approach to achieving the Town's objectives and creates a strong foundation for municipal operations.

4.0 Future State Recommendations

This section of the report will outline the full suite of recommendations suggested to improve future state operations. These recommendations build on the current state opportunities and have been further refined through conversation with the Town’s Leadership Team. Recommendations are designed to be execution focused, providing clarity on the issues being addressed by the recommendation, as well as how the recommendation may be implemented in the future.

4.1 Summary of Recommendations

The table below provides an overview of the suite of recommendations suggested to enhance the current state. Each recommendation will be further developed in the sections below.

#	Recommendation Title
1	Complete Procurement Policy Refresh Project
2	Refreshed Special Event Permit Processes, Structures, and Policy
3	Targeted Organizational Structure Changes to Support Continuous Growth and Staff Performance
4	Defining Customer Experience for the Town
5	Review and Implement Technology for Operations Teams (i.e., those who work in the community such as Public Works; Bylaw; Building)
6	Refresh and Formalize Corporate Performance Indicators

4.2 Implementation Considerations

While each recommendation described below provides critical information to support the Town as it looks to implement these into its operations, a clear understanding of how to prioritize recommendations and having a structured implementation plan will be critical. When summarizing recommendations, considerations for implementation have also been provided based on the expected benefit (outcomes) of the recommendation and the ease/difficulty of implementing the recommendation. Figure 2 Implementation Considerations Assessment Criteria below provides details on Expected Benefit and Ease of Implementation.

SCORING DESIGNATORS		HIGHLY FAVORABLE, POSITIVE (H)	MEDIUM (M)	SOMEWHAT FAVORABLE (L)
Rating Criteria		2	1	0
Ease of Implementation	1. Ease to Address	Easy to address, relatively small process/procedural adjustments.	Moderate. Changes will require a small group of stakeholders.	Difficult. Changes will require organization-wide changes, and will impact external stakeholders. Considerable planning required.
	2. Expected Timeline	Fast turnaround, can likely be completed within a single quarter.	Middle-range length of time, 2 - 4 quarters.	Longer-range recommendation, 1 year or more to complete.
	3. Implementation Cost/Investment	Low direct costs, can be handled in-house without need for third parties.	Moderate direct costs, potential opportunity/need to outsource.	High cost, high likelihood third party support will be required.
Expected Benefit	4. Improved Staff Efficiency	Staff time required to complete activities will be noticeably reduced.	Staff time to complete activities will be moderately reduced.	Staff time to complete activities will not be impacted.
	5. Improved Resident Experience	Residents will experience greater flexibility and improved value for money.	Residents may not notice changes to service experience, however there will be improved value for money.	Residents will not experience any improvements in service delivery and will not experience improved value for money.
	6. Expected Cost Savings	Recommendations are expected to drive substantial cost savings for the Town.	Recommendations are expected to drive moderate, yet tangible cost savings for the Town.	Recommendations will not result in any cost savings for the Town.

Figure 2 Implementation Considerations Assessment Criteria

These criteria have been considered in the recommendations below when describing the implementation considerations for each recommendation.

4.3 Recommendation 1: Complete Procurement Policy Refresh Project

4.3.1 Overview of Recommendation

The Town should prioritize and undertake its already planned Procurement Policy refresh project. The specifics of the refresh project should include multiple facets, including:

- Updating the policy as written to ensure it aligns with modern requirements and leading practices.
- Fully separate the policy from the procedures, creating refreshed templates in the process.
- Use the new Delegations of Powers and Duties By-Law to update/refresh any mentions of delegations of authority in the Procurement Policy.
 - Note: When this project was completed in late 2023/early 2024, the Delegations of Powers and Duties By-Law did not exist. This comment has been updated as of November 20.
- Further explore how digitization of procurement processes can enhance activities.
- Explore and develop a realistic Vendor Management procedure.

Each of these unique aspects will enable the Town to better streamline its procurement activities, ensuring similarities between teams as they undertake procurement activities, and allowing the Leadership Team to more efficiently enact changes to procedures.

4.3.1.1 Updating the policy as written to ensure it aligns with modern requirements and leading practices

The Town should update its's procurement policy to align with modern requirements and best practices. Key updates should include:

- Incorporation of modern procurement vehicles, such as Vendors of Record, which can enhance procurement efficiency by streamlining processes and leveraging cost savings through bulk purchasing or prequalified vendors.
- Clearly defined roles and responsibilities for staff to ensure smoother procurement operations.
- Consideration for specific elements like Free Trade Agreements and Environmental/Green Procurement clauses to guide staff on compliance and sustainability considerations.
- Consideration for situations where the use of fairness monitors for complex or high-risk procurements.
- How local preference clauses are handled, with legal support if needed.
- An update to definitions, procedures, and outdated language (e.g., replacing newspaper advertising with digital platforms) to ensure the policy reflects current operational realities.

Appendix A has been provided to include additional detailed information regarding considerations for the revisions noted above.

4.3.1.2 Fully separate the policy from the procedures, creating refreshed templates in the process

Removing the policy from the procedures will allow the Town to more rapidly amend the procedures as advances in technology take place, and/or as changes are required. These should be aligned with any refreshed or updated policy documents, to ensure the full suite of procedures to support staff is known and communicated.

The existing procurement templates should be reviewed and refreshed, ensuring they have the appropriate language, content, and provide clear instructions for departments undertaking procurement activities.

4.3.1.3 Separate and refresh the delegations of authority

Existing Delegations of Authority as outlined in the procurement policy are relatively clear, but have not been reviewed/refreshed for an extended period of time. The Delegation of Authority should be reviewed and updated to ensure that there is:

- General alignment with comparator organizations;
- Understanding between leadership and all levels of staff;
- Confirmation from Council on the appropriateness of levels.

In addition to this, once refreshed, the procurement policy should link to a newly developed by-law, which will include all scopes and types of delegations of authority. *Note: After this review was completed, the Town created a Delegations of Powers and Duties By-Law, which addresses this recommendation. Comments from the Town note that the references of delegations of authority in the Procurement Policy are still in place but need to be removed to and replaced with a reference/link to the new By-Law.*

- Consolidating these into a single document will enable the Town to conduct a holistic review of its full suite of delegations of authority and ensure there is alignment and common standards for all.

4.3.1.4 Further explore how digitization of procurement processes can enhance activities

Review additional capabilities and possibilities with the Town's existing digital procurement platform, Biddingo, to determine if there are ways this can further enhance the reality or perception of fairness and transparency for bidders.

Furthermore, explore new or emerging technology tools, such as AI (e.g., Microsoft Copilot) to determine if/how these can be used in the procurement process to reduce staff time and increase efficiency.

4.3.1.5 Explore and develop a realistic Vendor Management procedure

A later-term aspect to consider would be the exploration of a clear Vendor Management process. This entails roles and responsibilities for staff to follow when engaging external third parties.

- This should include methodologies to manage both adequate and under-performing external partners, to ensure that if warnings or corrective actions are ever required towards external partners, the Town has a solid backing on which it can rely for its evidence/justification.

4.3.2 Current State Challenges Addressed

Procurement was a theme that was raised across multiple engagement activities, from multiple departments, all having their own unique challenges and impressions on the process. Consistent themes across all engagement activities were that the policy is likely due for a refresh and that staff were unaware of formal templates for various activities, and often felt as though they were “starting from scratch” for each procurement completed. It was often noted that staff would take templates from other procurements and other departments and would do their best to fit these into their needs. This was raised as a challenge because staff were not always sure if certain criteria were required to be included or if they were specific to a certain department.

Staff noted that while Request for Proposal (RFP) processes always had unique evaluation criteria, (as is expected and good practice) there was minimal guidance provided in determining the appropriate evaluation criteria required. Additional challenges included some staff being unsure if/how staff could engage local vendors to respond to these RFPs through the online bid platform used by the Town. Lastly, some stakeholders noted that there were concerns related to how unstandardized the vendor selection and management processes are in the Town. It was noted that the Town does not have clear guidance in place to effectively manage vendors who may not perform to standards/expectations, and as such, there are challenges when evaluating future RFP responses.

This section defines the challenges that this recommendation will address by breaking down current state findings across the policy itself, the templates in place, delegations of authority, digitization, and vendor management.

Policy Overview

- The current procurement policy was drafted in 2006-2007 and received an update in 2023 and 2024.
 - There have been no major or fundamental changes to the document in nearly fifteen years.
- The policy does include many of the basic elements of procurement, however, there is opportunity for the Town to update its document to better align with leading practices, modern procurement activities, and enhanced operational structures.
- Furthermore, the procurement vehicles allowed in the existing policy do not include all options available to the Town.
 - In particular, items such as Vendors of Record are used by some groups but are not reflected in the policy.
 - Other missing items in the policy include green procurement clauses and services such as Fairness Monitoring services.
 - The result can be inefficient or less than effective procurement activities that take more time than necessary and/or happen more frequently than required.

- The inclusion of both the policy and procedures in a single document negatively impacts the Town's responsiveness to changes.
 - If separated, the Town could quickly move to internally amend procedures, however, with the procedures coupled with the policy, any procedural amendments would need to be reviewed/approved by Council prior to implementation. This negates the benefits of having procedures.

Templates

- While templates exist for common procurement activities (e.g., Requests for Tenders, Requests for Proposals), the staff who often conduct these procurement activities are unaware of their existence and/or the location of the templates.
- Instead, staff often spend time locating a recent procurement option reviewing the content, and stripping information they believe is not applicable to their procurement needs.
- In interviews, staff noted how this left them confused and feeling vulnerable, as they were unsure if a clause in an older document was required or if it was specific to the previous procurement.

Delegations of Authority

- In conversation with staff, it was noted that the delegations of authority, which stipulates the dollar value any one level of staff can independently authorize for a procurement, were outdated and required a review.
- Given the changes in the municipal landscape, there may be a need to update these values to better align with the costs of goods and services today, while still reducing the overall need for Council/senior leadership involvement in procurement activities.
- It was further noted that there is likely a need to better explain the differences between procurement/purchasing ability, and the ability of individuals to execute agreements that bind the Corporation.
 - Note: After this review was completed in late 2023/early 2024, staff brought forward an amendment in July 2024 to the Purchasing Policy to clarify the difference between purchasing abilities and ability of individuals to execute contracts. The language explicitly authorizes Department Heads to sign purchase contracts of up to \$25,000 and the Mayor and Director of Corporate Services/Clerk to sign purchase contracts of \$25,001 to \$50,000.
- Delegations of authority currently exist in the procurement policy, as well as in other policies/by-laws across the Town. There is a desire by Town leadership to consolidate all delegations of authority into a single by-law. This would enable a holistic review of delegations of authority.

Digitization

- Bracebridge currently uses Biddingo for its procurement activities. The use of Biddingo and a digital platform for procurement activities.

- While vendor submissions are received on the Biddingo platform, there are alternative and/or additional features that can be explored on the platform that may or may not increase vendor transparency and/or confidence in the process.

Vendor Management

- Vendor management procedures are generally designed to ensure there are clearly defined roles and responsibilities for staff and vendors, so that if and as vendors perform either above, at, or below expectations it is documented and understood. This is increasingly beneficial if the Town were to have challenges with its vendors within its pool of third party supports. In these instances, the Procedures would allow for the vendor to be managed, receive clear messaging, and the consequences of their action or inaction be clearly understood.
- No vendor management processes or procedures are currently, explicitly documented to ensure all Town staff understand how to manage vendors they work with, regardless of performance.
- While this has not resulted in any unique challenges for the Town thus far, there is potential for this to be a risk to the Town in future.

4.3.3 Implementation Considerations

4.3.3.1 Ease of Implementation, Expected Impact, and Cost Drivers

Ease of Implementation



Medium

This recommendation will require staff time and effort to research the appropriate wording for clauses, ensure that all required free trade agreements are included, and ensure that the policy is compliant broadly. The policy will also require Council approval.

Creation and/or updating of the procedures and templates, as well as the implementation (and any associated training, as required), will take staff time and effort.

Expected Benefit



Medium

For those who conduct procurement activities, the updated policy, procedures, and templates should have a clear benefit that will increase efficiency and reduce effort. This may also impact potential delegations of authority, if this is considered or reviewed as part of or an adjunct to this process.

However, the majority of staff in the Town do not conduct procurement activities frequently. Furthermore, those staff who do conduct procurement activities are not doing so daily.

Cost Drivers

Staff Time: The largest cost driver will be staff time and effort to conduct the research and/or develop the updated policy and procedures. This will take time to research, develop content, review it with partners/other staff members, and ultimately have it approved by Council. Training on the updated policy and procedures will also require staff time and effort.

Third Party Support: If desired, this work can be outsourced to either legal consultants or management consultants to support the research and drafting work. This could potentially expedite timelines, while almost certainly reducing staff effort expended but increase costs.

Technology: Dependent on the scope/scale of changes made in the policy and procedures, there might be additional technology costs in the future. However, this is a longer-term consideration and not an immediate and/or near-term need/consideration.

4.3.3.2 Overarching Approach

Updating the procurement approach (policy, process, templates, etc.) should be undertaken in multiple steps, to ensure the work is structured, timebound, and done in a phased manner to ensure that staff are able to make progress while managing their day-to-day activities. While the section above provides some of the key work items to consider, and below information is provided to support the rapid adoption of potential inclusions to the policy, this section provides the general methodology for updating the policy.

The first step should be to prioritize the activities that are intended to be undertaken. Once prioritized, an overarching timeline should be developed that will identify when each item is expected to be completed. Once completed and validated with the leadership team, there should then be resource(s) assigned to lead each aspect of the refresh project. Identifying core stakeholders to engage, or others to research will be important considerations that will drive efficiency and broader success. From this point, the items listed below can provide structure for the refresh project.

Consideration should also be given to who should undertake the refresh of the procurement policy. Many municipalities will often rely on legal consultants to help develop updated procurement policies and templates, which can be costly but can ensure compliance with legal requirements. Others will rely on procurement experts/fairness monitors to provide this support in a manner that is not biased towards an overly legalistic document. Other groups will update their own policies and templates in-house, ensuring that it aligns with leading practices but is still rightsized to the municipality. Some groups (e.g., Vaughan) have updated documents/policies themselves, but have then reached out to partners to have a review of the draft updated documents to ensure they are clear, rational, and do not create undue or unforeseen challenges for the bidder community.

4.3.3.3 Updating the procurement policy

Updating the procurement policy will require a review and research of similar or like-sized municipalities to identify leading practices and incorporate these into the document. The process should undertake the following core steps:

- Select a long list of potential comparators that can be reviewed.
 - In the experience of Optimus SBR, a long list is generally required due to the infrequency by which some municipalities update their procurement policies. While some municipalities may be very similar to Bracebridge or may be a common comparator of the Town for other aspects, the recency of their policy/by-law may remove them as a comparator in this instance.
- Obtain a copy of the comparators' policies.
- Review comparator policies and identify content that is:
 - Absent in the Bracebridge policy;
 - Outdated in the Bracebridge policy; or,
 - Unique to Bracebridge's policy.
- Once a list of key differences are defined, determine what is appropriate for inclusion in the updated policy at Bracebridge and begin collecting sample verbiage from comparators. Edit this verbiage to ensure it aligns with the realities of Bracebridge.
- Review draft language, ensure the appropriate individuals/groups review and sign-off on the content, and present the updated policy to Council for approval.

To support the Town in this process, Optimus SBR has included sample verbiage for some sections that are currently absent in the Town's policy. This has been provided in Appendix A.

4.3.3.4 Fully Separate the Policy from Procedures

It is anticipated that the refresh of the procurement policy would be a Finance project. The Project Lead should identify the areas they feel are core to the policy's direction-setting and scoping, as well as those items that are procedural or process-oriented in nature. Once identified, those items that are more procedural in nature should be removed from the document and used to form a procedure document in and of itself.

4.3.3.5 Refreshed Procurement Templates

The lead for the procurement policy refresh project should undertake a review of the existing templates to understand the following information:

- What in the existing templates is working well and should be maintained?
- What, based on research of other policies, is missing in templates and needs to be included?
- What information is included, but should be deleted to align with modern operating standards?

In addition to this independent review, the lead for this portion of the project should engage staff members who routinely lead procurement activities to understand what issues/concerns they have with the existing templates. This can include the baseline content included in the template, instructional content provided, or if there is any legal content that should be reviewed/amended/removed.

Once new templates are created, the lead should validate its contents and structure with key stakeholders and trusted vendors/partners, to conduct a review of the content to ensure it aligns with leading practices, and that there are no major concerns from an external perspective.

4.3.3.6 Delegations of Authority

The first step of the process should be to seek agreement, internally, to consolidate all delegations of authority into a single by-law. If agreed, delegations of authority should be removed from the procurement policy and incorporated into the newly developed by-law. The procurement policy should include a link and/or reference to the new delegations of authority by-law. *Note: Per earlier comments, this development of the Delegations of Powers and Duties By-Law has been developed, but the existing Policy will still need to be amended to remove the delegated purchasing levels and include a link/reference to the new By-Law.*

Staff should also be engaged to understand where the existing delegations, as they relate to the procurement policy, are seen as either unclear, too low, or too high. Once there are themes that are defined and codified, the team responsible for updating the delegations should undertake a three step process:

1. Conduct a review of other municipalities to understand how the procurement delegations compare to others.
2. Conduct a historic procurement spend analysis to determine the appropriate thresholds and incorporate these into updated draft limits.
 - a. The first step will be to create a consolidated list of the procurement spend from across the Town for the past 3 – 5 years. This list should include:
 - i. Department that procured a good or service.
 - ii. What was procured specifically (e.g., consulting services, gravel, road paving services, etc.).
 - iii. The dollar amount for the procurement.
 - iv. How the procurement was undertaken (e.g., competitive procurement, Director discretionary fund, etc.).
 - b. Review the analysis to determine:
 - i. The frequency of relatively normal or routine procurement activities for necessary activities/services/goods.
 - ii. The mean and median procurement amounts.
 - iii. The total number of procurements that exceed the mean and median numbers.
 - iv. The cost of outlier procurements.
 - v. Approximate time that was required by staff to get sign-off and approval from senior leadership and Council.
3. Use the above analysis to create updated proposed delegations.
 - a. Analysis of information should inform potential limits for authority, with justification provided including information such as:
 - i. The amount of time savings that leadership and Council can expect to see.
 - ii. The relative safety that these types and sizes of procurements provide to the Town. This enables the Town to manage risk related to specific areas of spending.

In addition to the above, the procurement refresh process should also clearly define the difference between procurement delegations of authority and authority to bind the Corporation. This is a common misconception that some may have, where their allowance to spend and procure up to a certain dollar limit is then confused with the ability to sign contracts that bind the Corporation. Setting a clear definition and outlining the permissible activities under the by-law will be important. *Note: since the review was completed, in July 2024, this change has been actioned by the Town's staff.*

4.3.3.7 Exploring Digitization Tools

The Finance team should set up a meeting with Bidding administrators to explore the full suite of tools and options that can be reviewed and enacted on the platform. The review should consider the following questions:

- Will this option, if implemented, improve the perception of transparency and fairness for vendors?
- What are the costs associated with other options?
- Will this option, if implemented, improve the efficiency and experience of staff undertaking procurement activities?

As a longer-term aspect of this sub-recommendation, and dependent on contract terms, comfort, and desire, the Town can consider whether other platforms are more appropriate/more effective for its needs. For clarity, this is not an absolute requirement/need, but is an element of good practice that can ensure that the Town gets the most value for its activities, its spend, and its responses.

4.3.3.8 Vendor Management

This component of the procurement policy refresh recommendation should be considered as an important, but lower priority item compared to those above. As such, it is suggested that this be the final item on a workplan for this recommendation. Vendor management enhancements would also be a driver of staff time and effort associated with this recommendation and therefore should be considered carefully against other Town priorities.

To develop the vendor management procedure, the Town should research the general structures and content incorporated in the vendor management activities of other municipalities.¹ As the Town reviews this content, having discussions with each municipality to understand how their procedure was developed, if it has ever been enforced, and outcomes/learnings will be beneficial to determine if/how Bracebridge would want to implement and/or change its activities.

Once a framework is developed, having an external review (i.e., legal and/or procurement expert) will be critical to ensure that there are no major issues/concerns that are included in the draft language before it is finalized and implemented.

Once developed, approved, and implemented, a clear vendor awareness campaign would be critical to ensure that there is an understanding of what the procedure is, what it entails, and how

¹ In Optimus SBR's experience, the City of Vaughan, while larger than the Town of Bracebridge, has developed a strong, clear, and defensible vendor management process that could serve as a framework for future consideration by the Town.

it might impact vendors. Reference to the procedure can also be added to third party contracts templates for added awareness.

4.3.4 Change Management Considerations

Refreshing the Procurement Policy will be a relatively intensive process, despite the strength of the current policy. This should be treated as a full project, with accountability structures put in place, a lead for development, and plans for research and engagement.

Change management barriers and mitigation tactics for the Town to consider include:

Resistance to change – Since the town has an existing procurement policy with many strengths, staff may resist updates to the procurement policy, particularly if they are used to the current processes or fear increased workload. Mitigation should include:

- Engage staff early in the process by involving them in discussions and explaining the benefits of the new policy. This may focus on identifying gaps while highlighting what has worked to date and recognizing staff commitment towards good procurement practices. Highlight how the changes will streamline procurement and make their work easier over time.

Fear of Unnecessary Scrutiny on Potential Errors - New policies may introduce stricter controls or transparency requirements, causing concerns about increased scrutiny for potential errors. Mitigation should include:

- Address these fears by providing support and resources to help staff navigate new policies. Emphasize that the changes are aimed at improving fairness and efficiency, not punishing mistakes. The policies are also designed to help ensure that staff and the Town follow good practices which will limit likelihood of vendor challenges or complaints.

Training Challenges - Inadequate or delayed training can hinder the effective adoption of new procurement procedures. Mitigation should include:

- The Town should provide ongoing training programs tailored to different staff roles. Ensure that training is available before the new policy goes into effect and that follow-up sessions are offered to address any challenges.

Beyond identifying the specific areas for refreshing, the lead for this project should actively engage with other departments in the Town to ensure there is a common understanding of what they appreciate and what they find challenging in the existing policy. Doing this activity will increase potential uptake and buy-in about the changes being made and can act as an effective communication tool about the changes that would be expected at the individual level. This should include targeted/focused training for individuals who may be more frequently involved in procurement activities. The Project Lead should make sure that these staff members who are more frequently involved in procurement activities are provided with training that, where necessary is customized to their unique needs or department considerations.

4.3.5 Summary of Benefits

Bracebridge could reasonably expect the following benefits if they undertake the various activities listed above:

- Increased clarity for staff related to roles and responsibilities, and knowing what should or should not be included/undertaken when moving through procurement activities.
- Greater standardization in procurement activities.
- Modern procurement tools that could be employed to reduce the overall need for repetitive procurements (e.g., a single Vendor of Record for standard activities vs. multiple unique procurements).
- Refreshed structures that could potentially support a more effective and efficient procurement process.
- The ability to more swiftly update procurement procedures.
- Holistic reviews of delegations of authority to ensure these are aligned and appropriate across the Town and across activities.
- Use of leading tools can reduce staff time and can increase the perception of fairness and transparency for vendors.
- Defensible and realistic activities that can be employed to support teams as they engage third party vendors.

4.4 Recommendation 2: Refreshed Special Event Permit Processes, Structure, and Policy

4.4.1 Overview of Recommendation

Special Event Permits should have a refreshed process implemented to support greater staff coordination, enhanced customer service, and to remove the frequency of last minute challenges in hosting community organized events.

To enhance the Special Event Permit process, the following aspects should be considered:

- Assignment of a special event permit coordination duties to an existing staff member (ideally at the Manager/Supervisory staff level).
- Standing up a Special Event Working Group to support execution.

Creating this structure can remove some of the existing challenges in the process (detailed below) by creating a coordination function and body that can support the intake of events, facilitate joint decision-making and management, and provide additional structure/communication channels for execution.

A longer-term aspect of this recommendation for the Town to consider would be the potential refresh and/or repeal/replacement of the existing Special Event Permit policy, including its associated processes, delegations of authority, and other associated items.

A Note Regarding Other Municipalities

Understanding the unique challenges and concerns that the Bracebridge team has when it comes to Special Event Permits, the Optimus SBR team engaged Niagara-on-the-Lake and Lakeshore to understand how they approach Special Event Permits. These municipalities were selected based on similar size, seasonality, and relationships held by Optimus SBR with both municipalities. The findings of these efforts found that the recommendations provided by Optimus SBR aligns with the good practices found in these municipalities.

Both focus on having a dedicated coordinator who helps to direct and lead the special event permit process. In Niagara-on-the-Lake, it was noted that this function is currently carried out by an administrative resource, but it was noted that a managerial/supervisory resource would be seen as beneficial. In both, there was a group/coordinating committee responsible for reviewing the application, identifying the work to complete, and executing the work as appropriate. In Niagara-on-the-Lake, the team uses HCL Notes (formerly Lotus Notes) to help organize the workflow and follow-up on the activities of each department. Niagara-on-the-Lake undertakes approximately 160+ events per year and finds this structure to be efficient and effective at enabling events to take place. This includes having simplified insurance certificates (i.e., \$2M or \$5M, depending on the size of the event), and having a six (6) week process to receive an application through to hosting the event.

It should be noted that Park Permits also existed in these municipalities, and often were included as part of a workflow through a special event permit. However, it was noted that if an event was requested by the public that was not a special event, but did want to use a facility (e.g., a soccer field for a kid's birthday party), park permits were issued and kept separate from this special event permit.

4.4.1.1 Assignment of a special event permit coordination duties to an existing staff member (ideally at the Manager/Supervisory Staff Level)

Identifying an individual who has direct accountability to manage and coordinate the special event permit process will fill a void that currently exists in the Town, where there is no clear process "quarterback". This role is not to be confused with being the owner of every special event/event permit request, but rather is designed to ensure that as permits are requested, they are managed in a straightforward, efficient, and effective manner.

The individual assigned these responsibilities (the "Coordinator") should be in a managerial/supervisory position who has some familiarity with the special event permitting process, so that there is less of a learning curve, and so that there is a relevant level of authority to direct staff if and as appropriate. It is recommended that the Coordinator falls within one of the following departments: Recreation, Planning and Development, or Corporate Services. This recommendation is based on the existing roles and responsibilities of these three departments in the process.

The Coordinator should be involved in all special event permit processes, acting as the central body to ensure the application is properly recognized and moved forward. This does not imply that the Coordinator is the only avenue by which the public submits requests for permits, rather, it is expected that the existing Customer Service Representatives in the Recreation Department will continue to be a valuable resource in this process, with their specific roles being further defined in *Implementation Considerations* below.

4.4.1.2 Standing Up a Special Event Working Group to Support Execution

While the Coordinator would help to organize the intake, process, and execution of a permit, this Working Group would include delegates from all groups involved to execute on permitting activities. Specifically, it should have representatives from:

- Corporate Services;
- Recreation;
- Public Works;
- Finance;
- Planning and Development;
- Fire Services;
- Others if deemed appropriate.

The Coordinator should convene the Working Group to review the applications and ensure that the respective stakeholders are completing their tasks related to the permit request within the timelines for completion. In the immediate term, identifying key stakeholders to this process and developing a Terms of Reference to define who will support and to what end will be critical. Through a tool like a Terms of Reference, there will be clear roles and responsibilities, accountability, and no ambiguity about the intent and purpose of the Working Group. The frequency upon which the Coordinator should convene the Working Group should be established by the Town based on permit volumes/applications and turnaround times for permits. It is likely that this would be achieved through a regular standing meeting of the Working Group to review applications received since the last meeting; with ad hoc or special meetings scheduled as needed based on unique situations or circumstances. It is expected that this would be a generative meeting in which stakeholders would volunteer and/or assume tasks related to the permit request based on their specific area of focus. An example would be Recreation reviewing the information to provide a Park Permit,² while Public Works would review and determine the need to provide resources such as barricades.

In an ideal setting, this group would involve a mixture of internal Town resources as well as external stakeholder agencies (e.g., police services, District representation) who all have a potential role to play in the planning and/or execution of an event.

As the Working Group becomes established and participants become familiar with roles and responsibilities, the Town should consider using the Working Group to review the full suite of events that take place in the Town year-over-year and identify the events, or types of events, that

² A note regarding Park Permits. This recommendation is not suggesting that Park Permits would be removed from this process. Rather that, if and as appropriate for each Special Event, Park Permits would be granted as a component of the Special Event Permit process. This allows Park Permits to still be booked for those items that are not special events (e.g., a picnic or children's birthday party), while incorporating their issuance as required in a special event.

are recurring and what is required in each of those instances to approve the permit. For those events, the Working Group could then create standardized “playbooks” of activity that would define how an event would be executed, removing future pressure when this event permit is received.

An additional task of this Working Group can include reviewing the appropriate lead time for a permit request to be made, prior to execution of the event, leading to a potential refresh of the existing target of 90 days, and realistic response standards/expectations for staff. Once developed, any proposed changes to the timelines for requesting special event permits could be tested/validated by leadership team and/or Council. This would also provide the Town with a clear understanding of expectations from Vendors regarding the amount of time required for requesting a permit and information required. These details can be communicated to regular vendors, the community and other stakeholders to promote an understanding of requirements as well commitments of the Town regarding response/processing time.

Council’s involvement in this process is not required for success. However it is suggested that Council be provided with an overview of the role of the Working Group and how it supports the Town respond to vendors when requests are made within reasonable timelines. This understanding would assist in ensuring that the Town, as a whole, operates with a shared understanding and as a united front if there are permit requests issued with too little lead time. Consistently enforcing permit lead times will enable the Town to more effectively respond to vendors who provide minimal notice, and, where necessary, provide the ability to deny special event permit requests if and as it creates unrealistic work expectations for staff.

4.4.1.3 Refreshing and/or Repealing and Replacing the Special Event Permit Policy

This should be a longer-term component of the recommendation that would be undertaken at the earliest after the summer season, during which the majority of special events take place. The Working Group could be repurposed to review and suggest changes to/develop a new Special Events Policy, which would be more aligned to internal requirements, the local landscape today, and the needs/desires of the Town. The refresh and/or replacement of the policy should include leading practices from other municipalities and should include engagement of Town staff and, potentially, known event organizers to streamline activities.

4.4.2 Current State Challenges Addressed

Special Events Generally

- Each year there are approximately 20 – 25 special events that take place within the geographic boundaries of Bracebridge.
- Each event is reviewed to understand its unique needs, with tracking being completed by Corporate Services as seen in the graphic below.

Figure 3: Special Event Permit specifics for the past four years

	2020	2021	2022	2023
Number of Events	14	4	25	23
Events in Town Parks/Property	14	4	23	21
Events Requiring Rec. Permit	12	3	19	20
Noise Exemption	8	4	19	8
Alcohol at Events	1	1	4	6
Significant Event Status	0	0	1	0
Road Closure				
District of Muskoka	2	0	10	9
Town of Bracebridge	2	0	11	13
Parking Restrictions				
District of Muskoka	1	0	6	9
Town of Bracebridge	1	0	8	12
Comments Provided				
Bracebridge By-law	9	3	3	7
Bracebridge Public Works	8	3	18	17
Bracebridge Fire	9	4	19	16
Bracebridge CBO	8	4	9	17
Bracebridge Recreation	1	1	0	2
Bracebridge Economic Development	0	0	14	2
District of Muskoka EMS	1	2	14	9
District of Muskoka Public Works	2	4	6	6
OPP (Bracebridge Detachment)	1	0	2	1
Simcoe/Muskoka Health Unit	0	2	2	2
Other	1	0	0	0

- The Town developed a [straightforward permit guideline/questionnaire](#) that all applicants receive upon request of a permit, that clearly outlines expected timelines for application (90 days prior to the event), as well as costs and required information.
 - Despite this form, the actual application timeline of these events varies and can range from a months-long lead time to as little as five days.
- Despite clearly defined requirements, staff often feel pressure to successfully support applicants, regardless of adherence to the stated required timeline.
 - There is acknowledgement that if applications are denied due to insufficient lead times that a very real possibility of negative publicity could be received, regardless of the circumstances involved.

Defining the Special Event Permit Process

- The process by which special event permits are approved is unstructured and does not have clear roles or responsibilities for the stakeholders involved in the process.
- Permit applications can be received both in-person or electronically, with the majority of applications being received via email submission.
 - In-person permit requests are received primarily by Customer Service Representatives at a Recreation facility, or by Corporate Services Administrative staff at the Municipal Office.
 - It should be noted that only the Corporate Services Department can issue the special event permit.
 - When asked why Recreation may receive requests, it was noted that it is likely due to two reasons: 1) Recreation facilities have longer opening

hours than the Municipal Office, and 2) residents may be unaware where to go/what they need to request.

- Despite where they are initially received, applications must be received in a fully complete manner to the Corporate Services Department.
- There is no clear ownership of special event permits in the Town at present, with groups working together in an ad hoc manner as required.
- The Director of Corporate Services/Clerk has binding authority for the Town, and as such is the final signing authority for approved special event permits.
- During engagement meetings held as part of this project, non-leadership staff noted that the process for the public was primarily staff-centric, and could be confusing and/or frustrating for staff. Specific examples included:
 - The public may first go to Recreation, where a Park Permit may be issued.
 - The Recreation representative has the opportunity to resell insurance to the applicant on the spot, acting as a representative of the Town's current broker. Despite this role, the Town does not receive any financial benefit for offering this service.
 - The Recreation team typically resells insurance for small events that do not necessarily require a Special Event permit. However, the Town's insurer has noted that different types of events do require different types/levels of insurance. As such, user groups/event organizers must show that they have a certificate of insurance that meets these requirements.
 - A challenge noted by staff in multiple departments was that they were not experts on insurance requirements/certificates of insurance, and as such they feel potentially under-equipped to identify the proper type/level of insurance. It was noted by Finance staff that this could be an area for future review to help streamline/simplify this process, however, they are available to assist in the current state if/as required.
 - Applicants are then directed to the Corporate Services Department, where their application will be reviewed at which time, the applicant may be required to produce new and/or different insurance.
- The potential need for applicants to go to multiple Town facilities and/or Departments was often noted alongside staff communication challenges between departments.
 - It was noted that challenges related to staff responsiveness between departments was a common issue and aggravating factor that delayed processes.
- Once a special event permit request is received, there is a general understanding of the roles and responsibilities of each department:
 - **Recreation** is included as recreation facilities/permits are required, as a possible face of the Town, and can offer insurance if/as necessary.
 - It should be noted that while any team can offer/sell insurance, the Recreation team has the bulk of this due to the number of indoor and outdoor small bookings by individuals/small event organizers.
 - **Corporate Services** is ultimately responsible for issuing the special event permit, and reviews applications and collects insurance certificates.
 - It was noted that the Corporate Services Department does not sell insurance, rather collects insurance certificates. There was a potential skills gap among staff noted as it relates to insurance requirements.

- **Public Works** is involved if there is equipment and material required for setup or takedown, road closures, and other related activities.
- **Finance** is tangentially involved from a certificate of insurance perspective.
- **Planning and Development** is involved as necessary, primarily focusing on their carriage of the Economic Development function in the Town.
- **Fire** is involved in assessing fire safety plans, ensuring compliance with fire codes, and evaluating the event site for adequate emergency access, crowd management, and fire prevention measures to safeguard public safety.
- No permitting software is currently in place; as such this is generally a paper-based service and/or has aspects completed in standalone departmental systems.
- While there is no clear ownership for the process today, there is no clear desire by groups to be the ultimate owner of the process.
 - Rather, all groups agree that greater collaboration is required and any future state solution should include structures to support this.

4.4.3 Implementation Considerations

4.4.3.1 Ease of Implementation, Expected Impact, and Cost Drivers

Ease of Implementation



Medium

This will require effort to identify an existing position to assume the role of Coordinator for the special events permitting tasks, including an assessment of workload and skill/ability to assume these added responsibilities. Similar challenges may exist for the Working Group broadly. This could include ensuring Working Group members are decision makers for the department they are representing. In situations where this is not possible, clear processes/expectations should be established so that information is taken back to their respective department and a decision made.

If/when the Policy is reviewed, it may be challenging to undertake this task, as it will require either a great deal of staff time and/or the procurement of third party supports.

Expected Benefit



Medium

The Town conducts approximately 25 special events each year, and as such this is not a daily or even weekly occurrence. However, additional coordination support should make this process easier, and the added mechanism to work together effectively and manage the process should help staff when these applications are received. This process can also be expected to provide a benefit to customers (event organizers,

vendors, etc.) who will have a more clear, defined and efficient process when applying for permits.

There may still be negative effects if staff feel unable to decline requests that are received very late/with no time to prepare/support.

A refreshed/new policy may create bigger impacts for individual staff member roles and responsibilities.

Cost Drivers

Staff Time: Adding the Coordinator tasks to an existing position will have an impact on the incumbent's current job responsibilities, especially during busy seasons such as the summer, and may require a job re-evaluation and compensation adjustment to the position. Additionally, reassignment of existing duties may be required to create capacity to perform the Coordinator tasks. Identification and appointment of staff to the Working Group, as well as their time in attendance at Working Group meetings will need to be factored into overall cost as well.

Technology: Technology is not expected to be a cost driver for this recommendation. Long-term the Town may wish to invest in software to support permitting and approval processes, however that is not currently viewed as a short or medium term priority. This technology would result in increase costs for the technology including costs for customization/implementation of the software; and any process redevelopment work to ensure it aligns with the ideal workflow of the Bracebridge team. However, it is important to reiterate that such an investment is not an immediate priority for the Town.

Third Party Support: If desired, the creation of a refreshed policy can be outsourced to reduce staff time and effort, but this would increase costs for the recommendation.

4.4.3.2 Overarching Approach

For this recommendation to be successful, cross-departmental collaboration will be critical. If teams and staff do not effectively communicate, collaborate, work together, or meet expected timelines then the process for special event permits will continue to be disorganized and frustrating for those involved. This recommendation effectively forces collaboration mechanisms between teams, which will need to be reinforced at all levels of leadership.

4.4.3.3 Assignment of a special event permit coordination duties to an existing staff member at the Manager/Supervisory Level

Step one for this activity should be for select leaders who have involvement/responsibilities associated with special events of Corporate Services, Recreation, Public Works, Finance, Fire, and Planning and Development to jointly and clearly define the scope, role and responsibilities of the Coordinator. Secondly, the leaders should identify an existing position for these tasks to be assigned to and work with the Human Resources branch to update the job description, determine

whether a job reevaluation and compensation adjustment is required and communicate any changes with the incumbent. Finally, the leader of the Coordinator should determine if a redistribution of any other tasks performed by the Coordinator should be made to other positions.

Optimus SBR suggests the following core tasks for the Coordinator:

- Receives a copy of all special event permit applications.
- Conducts an initial review of the application to understand baseline needs requests.
- Calls and chairs the Special Event Permit Working Group.
- Responsible as the primary point of contact with the applicant (unless another Working Group member determines their leadership as the point person is more appropriate).
 - Note: this will likely require coordination/communication with other Working Group members to ensure they have the appropriate/correct information when responding to the public.

One key item to note is that the Coordinator will *receive* a copy of all applications, and that they are not the only intake body for the Town. Rather, it would be assumed that all applicable client-facing staff would be trained to provide applicants with baseline information and/or accept a paper-copy of an application. Applicable client-facing staff would be responsible for:

- Providing an updated copy of the Application form that would have refreshed FAQs attached, key requirements, and other important information.
- Clearly explaining that even if they are receiving an application, they are not accepting or approving the application. Rather, they are acting in an intake capacity, and that the Coordinator and Working Group will review and respond to the applicant.
- Answering any other immediate questions that could reasonably be expected of client facing staff who are not specialists in Special Events.

As was noted above, the Coordinator would then have the ability to either call a Working Group meeting (see below for details) or would bring it to the next scheduled meeting, where the group would determine the appropriateness and feasibility of the application.

4.4.3.4 Standing Up a Special Event Working Group to Support Execution

Step one of implementation should include determining the appropriate representatives that should be involved in this Com Working Group mittee. It is expected that once established Town staff who are part of the Working Group would meet regularly (as defined by the Town). It External stakeholder (e.g., the District, local police services, EMTs, etc.) would be identified to be included in a formal and well structured (to be developed by the working group) communication and distribution channel. This would ensure that external stakeholders are provided with information as required and informed of special event permits and provided an opportunity to comment as needed. As required, the Coordinator can have external ad-hoc meetings with stakeholders to understand any needs or concerns or raise questions the Town may have for these stakeholders.

The Working Group should have a clear Terms of Reference developed, ensuring that as individual representatives change and shift over time there is consistency in the purpose, activities, and role of the Working Group. The Terms of Reference should define the role of the Working Group, frequency of meetings, the groups involved, and the generic scope of responsibilities any

individual/department can expect to undertake, and other activities the Working Group may be tasked with such as the creation of playbooks for simple events.

As the Working Group continues to operate, there should be a clear understanding of the impact this has on existing workload allocations, to determine if/how staff capacity may need to be amended to support those participating on this Working Group. Given the decision-making that may be required from this Working Group, it is suggested that membership be Manager-level or above.

4.4.3.5 Using the Special Event Working Group to Refresh/Replace the Existing Policy

Once the immediate pressures of the current season are passed, the Working Group can evolve, if desired, to lead the refresh and/or replacement of the existing policy. This team should work together to define the objective of the work, break down the core aspects/process parts they think will be required to be successful, and ultimately execute and/or oversee the execution of the work. This will ensure all key teams are included when refreshing and/or replacing the existing policy, and that the future state is something all teams can understand and align with moving forward.

4.4.4 Change Management Considerations

This recommendation, at its core, is the assignment of a Special Events Permit Coordinator function to an existing position, and the development of a new coordinating Working Group. While this may seem relatively straightforward, the following considerations may improve the odds of success:

- Clearly define the problem we are trying to solve.
 - Build on the known and recognized challenges that have surrounded special event permit and execution activities.
- Define the options that were considered and explain how this is the recommended option:
 - **Option 1 Considered: Status Quo.** Maintain the current structure in which collaboration, planning, and execution is ad hoc, with no structured supports. No major changes expected to the process or the outputs from the activities.
 - **Option 2 Considered: Single Department Lead.** Have one team who ultimately owns the permitting and execution processes. This would mean a single staff member would need to have access to all systems, would have the capability to direct staff in other departments to do items (either for permitting or execution of events), and would ultimately create a matrixed reporting structure for special events.
 - **Option 3 Considered: Coordinator and Working Group.** Provides realistic and functional structures that will drive coordination and collaboration, while maintaining departmental autonomy. Enables future planning to reduce execution challenges.
- Assigning Coordinator tasks.
 - The Coordinator should be in a management/supervisory position, so that they are able to effectively navigate between departments, delegate activities, and can help drive activity.

- The position should have a functional understanding of the special events process, but it is not required that they have been lead on executing permits in the past.
- Once selected, the role of the Coordinator should be clearly explained and defined for other staff members. This should come from senior leadership, to ensure there is no question as to why this role exists, their activities, and how they will likely engage with others in the organization.
- Implementing the Working Group.
 - Similar to the Coordinator, this Working Group should likely be comprised of management/supervisory-level staff. Working Group Members must be able to exercise decision-making authority on behalf of their department.
 - There should likely be a single contact for each department involved, with a backup delegate identified if and as necessary.
 - The Working Group should ensure the role of each department representative is well understood and clear in the Terms of Reference.
- Protecting Coordinator and Working Group capacity.
 - One challenge will be ensuring that when there are permit processes underway that staff are given the appropriate time to dedicate to the special event permit process, as well as their core role/responsibilities.
 - Working Group roles and time commitments will vary with each permit, requiring different levels of effort. Staff should be able to allocate the time needed to fulfill their Working Group responsibilities effectively, as necessary.
- Setting realistic, meaningful, and enforced minimum event lead times.
 - A core challenge in today's environment is that many organizers are applying for permits with very short notice ahead of the planned event. This creates an environment of rush reviews and approvals, which is complicated by the number of internal and external stakeholders who must be engaged in a short period of time.
 - Once developed, the Working Group will require the support of senior leadership (i.e., CAO, Directors) to set and empower enforcement of timelines. Council support of timelines would also be required.
 - If and as organizers do not align with minimum requirements, there will likely be a need to deny an application purely due to lack of lead time. The concern today is that this will receive negative media attention, public consternation from Council and community members, and will reflect poorly on the Town.
 - If and as minimums are set, it will be critical to ensure that Council and leadership are comfortable maintaining these, even if it may result in some challenges from the public/organizers.

4.4.5 Summary of Benefits

The Town could reasonably expect the following benefits if they undertake the various activities listed above:

- Increased collaboration and coordination as it relates to special events in the Town through enhanced structures and processes.
- Coordination to help guide the intake process for applications, including refreshed training for staff on the expected activities and process when engaging with applicants.
- Defining clear roles and responsibilities for staff and departments as it relates to reviewing/approving applications, with structures to support clarity in execution.
- Opportunity to proactively develop defined playbooks for set types of events.
- Opportunity to more effectively set and enforce requirements with applicants to reduce negative staff impacts.

4.5 Recommendation 3: Targeted Organizational Structure Changes to Support Continuous Growth and Staff Performance

4.5.1 Overview of Recommendation

The current organizational structure of the Town of Bracebridge works well to support the tasks and teams of today to accomplish their specific goals and objectives. This recommendation is not suggesting a full-scale reorganization, rather identifies specific areas that should be considered to support future growth. Refreshing the existing organizational structure in targeted ways will improve the functioning of specific teams, and will ensure there is the appropriate level of consideration given to accommodate and direct future growth..

When examining the existing organizational structure, there are short-, medium- and long-term opportunities to consider. It is important to note that these recommendations build on prior work completed by the Town which comment on structure and staffing considerations. These include the Planning and Development Service Delivery Review, line-by-line budget review, fire master plan, etc. Optimus SBR did not find any evidence from document review or stakeholder consultations that suggested the recommendations in those reports are not valid. The recommendations contained below should be viewed as supplementary and not to supersede past work completed by the Town:

- Short Term
 - Introduce one net new Climate Change Specialist position under the Office of the CAO to serve as a shared resource across the organization, but works under the direction of the CAO and Council.
 - Introduce one net new Executive Assistant (full-time) position under the Office of the CAO to provide administrative support to the CAO, Mayor, Council and Committees of Council. This could allow the Town to centralize some of the support provided by the Clerk, Deputy Clerk, Planning Administrator, Administrative Assistants, etc. allowing these individuals to focus on larger responsibilities.
- Medium Term
 - Explore the feasibility of aligning the Payroll and Benefits function from the Finance Department to the Corporate Services Department.
- Long Term
 - Review and consider potential need and/or benefits of moving the Human Resources Branch out of the Corporate Services Department and into its own Department.

Each of these opportunities will enable the Town to drive broader changes and enhance the scope and activity of the Town in the future. These opportunities may also include enhancements to the maturity of teams' functioning. For example, the Executive Assistant role identified above will remove administrative tasks from a number of senior level resources at the Town, allowing them to focus on more strategic and impactful tasks.

4.5.2 Current State Challenges Addressed

To be very clear, the Town's current organizational structure is by no means "broken" or non-functional. The above recommendations are not meant to imply that the existing organizational structure is unworkable and/or in need of a full replacement, but rather these targeted suggestions are to improve overarching operations. Some of the specific current state challenges that these recommendations will address, include:

- While the CAO's Office, through Council, is currently tasked with climate change planning and associated activities, the current Town structure has no staff member dedicated to this position or role.
 - Without the commitment of staffing resources to act on climate change related activities and priorities, it is unrealistic to expect that the Town will make the progress desired by Council. If the Town is committed to climate change priorities and activities it is necessary to establish a role that prioritizes this mandate.
- The Office of the CAO currently has two (2) FTE – the CAO and a Communications Coordinator. This means that any administrative tasks such as scheduling and other administrative tasks for the CAO or Mayor are handled by the CAO directly.
 - For the CAO, the result is that they are not able to focus consistently on their highest value tasks, as they are also facilitating and/or overseeing certain administrative activities that drive the municipality forward.
 - Additionally, the administrative workload for the various Committees of Council is distributed across multiple departments, which creates its own unique challenges such as a lack of consistency in the delivery of the service.
- The Human Resources Branch and Finance Department have discussed in the past the potential to realign the Payroll and Benefits function from the Finance Department to the Corporate Services Department. There has been question if this would allow for a greater focus on specific tasks, specialization of the role, and balancing of portfolios.
 - There are strong connections between the Corporate Services Department, Human Resources Branch and the salary and benefits administration activities that are currently handled by the Finance Department. Exploration of this recommendation would identify whether the activities would be more streamlined and effective if they were in a single department.
- The Human Resources Branch of the Corporate Services Department is responsible for recruitment, employee and labour relations, health, safety and wellness, human resources policy and compliance, and staff training/development. The Branch is currently comprised of two (2) Managers of Human Resources and one (1) Human Resources Coordinator.
 - Responsibilities have been divided across the two Manager responsibilities. This structure has supported the team and allowed them to be successful at completing their required activities to achieve and largely maintain compliance.
 - While this model works today, as the Town continues to grow, there may come a time that the splitting of tasks becomes an unsustainable way to manage the role. Furthermore, there may be a desire in the future to have a more strategic human resources role, which would require a different structure with a position having a consistent and long-term focus on the role of human resources in corporate decision-making.

4.5.3 Implementation Considerations

4.5.3.1 Ease of Implementation, Expected Impact, and Cost Drivers

Ease of Implementation



Medium

The completion of the short-term recommendations, will be relatively easy and fast to implement, depending on approval and the available talent pool.

The medium and long-term recommendations will require the Town to thoroughly explore the benefits and impacts of each recommendation before making a decision on whether to proceed.

Expected Benefit



Medium

The short-term recommendations will have a relatively large impact, allowing the CAO and Mayor to focus on higher value tasks. Similarly, adding consistency to the support for Council and Committees of Council will have benefits and will unlock staff capacity.

The medium and long-term recommendations have less well defined benefits at present, as more research is required to determine if these are appropriate organizational changes for the Town to pursue at a future date.

Cost Drivers

Staff Costs: Hiring of two (2) net new staff is an increased cost as it relates to salaries, benefits, technology, and even office space.

Staff Time: Time investment to develop job descriptions, onboard and train staff, and communicate roles and responsibilities of new roles to existing staff. Training time and effort can often be underestimated, but is a critical component to ensuring success for the individuals.

Technology: Once staffing and organizational changes are made, there are no major technology costs anticipated.

4.5.3.2 Overarching Approach

This recommendation should be implemented through small, manageable deliverables, as each of the proposed organizational structure changes is their own unique activity.

4.5.3.3 Short Term: Climate Change Specialist

The role of the Climate Change Specialist should first be defined by Town leadership, to ensure there is alignment on the core responsibilities, skillsets, competencies, and goals for the position.

This will be a net new position, and as such, there will be a need to establish a new job description, undertake job evaluation and salary placement, and other associated requirements of initiating the role and move through successful recruitment. A clearly defined action plan and set of key activities that will guide the work of the incumbent will also need to be established.

The Town will need to explore options regarding the positioning of this role within the organizational structure as there are options including the CAO's Office; Corporate Services; Planning and Development; and Public Works. For the Town, it is suggested that the role be located within the Planning and Development Department. This will support a close link to land use planning, urban design, and infrastructure development (in partnership with Engineering/Public Works). This allows the Climate Change Specialist to influence policies around sustainable development, zoning, and green infrastructure. An alternative for the Town would be to position the role in the CAO's Office to ensure high-level coordination of climate strategies across all departments. However, this would increase the CAO's already large number of direct reports.

4.5.3.4 Short Term: Executive Assistant for the CAO, Mayor, Council and Committees of Council

The CAO and Human Resources Branch should work together to define the core responsibilities, skillsets, and competencies for the position. This will be a net new position, and as such there will be a need to establish a new job description, undertake job evaluation and salary placement, and other associated requirements of initiating the role to support hiring into the position.

At the outset, the focus of the position should be primarily on supporting the administrative needs of the CAO and the Mayor. This will enable the incumbent to learn the unique aspects of the Town and its operating landscape. As the incumbent learns the role and the activities, the Town should then gradually introduce responsibilities for Council and Committees of Council so that they can support the existing staff members involved in committee work. The goal of this gradual approach is to ensure that the incumbent will have the necessary time and ability to learn the different elements and responsibilities of the role.

The Committees of Council responsibilities are currently distributed across multiple staff members from different departments in the Town. This creates a disjointed approach, making it difficult to create consistency in how the responsibilities are handled, and the tools and approaches used. Having a single position providing administrative support to Council and the Mayor, and take on the activities of Committees of Council will promote greater consistency and create capacity for the other staff currently involved in these duties to focus on their core job responsibilities for their role.

4.5.3.5 Medium Term: Explore the feasibility of aligning the Payroll and Benefits function from the Finance Department to the Corporate Services Department

There is no single right or appropriate "home" for payroll and benefits. Rather, municipalities and other organizations often position it either in Finance or Human Resources, as there are clear benefits and drawbacks to both. In Bracebridge the position currently sits within the Finance Department; however, there is a need for this role to consistently liaise with and support the Human Resources Branch in the Corporate Service Department, as members of each group

undertake their day-to-day activities. The Town should explore the benefits of aligning the Payroll and Benefit Coordinator position to the Human Resources Branch.

To conduct the review, the Town should undertake the following activities:

- Create an inventory of the full suite of job duties and responsibilities the position undertakes and identify/define when/where the role is required to interact with people from within their department, as well as from other departments.
- Review the skillsets and competencies required for the role to inform an optimal location in the organization for the role (i.e., if most skills, competencies, certifications, etc. are of a Human Resources nature the Human Resources Branch may be the best fit and vice versa for Finance).
- If desired, identify comparators that the Town would like to use to better understand the pros and cons of their current organizational structure. This should be focused on understanding the current and historical home for the role, and the impacts it has had on job performance, efficiency, and effectiveness.
- Review the span of control within the two departments, understanding what impact potentially removing/adding the role would have for each department and its management structures.

4.5.3.6 Long Term: Review and Consider Potential Need and/or Benefits of Moving the Human Resources Branch out of the Corporate Services Department and into its own Department

This is a longer-term recommendation and should only be undertaken after certain milestones or triggers are met. Namely, the Town should consider this option once a Human Resources Management System (HRMS) is in place and operational. This will ensure the impact and benefits of the HRMS on staff utilization and workload is fully understood in advance of making any potential large organizational changes.

As the municipality continues to grow and the volume and complexity of HR services and tasks naturally increases, the Town may need to evaluate the benefits and options on how to best deliver such services, it should undertake the following activities:

- Review the current workload of the team to determine if the current division of tasks is sufficient, or if there is a need to start dividing labour by departments/client portfolios, or other means.
- At a similar time, determine if there is a need for additional resources, specifically looking to the need to have a senior leader who is solely focused on long-term goalsetting and strategy to help both the HR team, but also the broader People goals of the Town.
 - This step should focus on two parts: first, the need for a dedicated leader. While today the HR team reports to the Director of Corporate Services/Clerk, there may be a need for someone solely focused on HR, rather than a multi-part mandate. Secondly, this should determine if there is a need for an HR-specific strategy. This should be in service of the Town's broader Strategy, but should focus process improvement activities, long-term goals, and key enablers for the team. As part of this, it would be critical to determine whether goals and objectives could be

achieved within the existing staff capacity and structure or whether revisions would be necessary.

- Determine the pros and cons of moving the Human Resources Branch out of the Corporate Services Department and into its own Department.
 - What benefits or barriers would this provide the team to enable them to more efficiently, confidentially, and/or effectively deliver service to the Corporation?
 - Could the team continue to be as effective under the existing organizational structure?

4.5.4 Summary of Benefits

Bracebridge could reasonably expect the following benefits if they undertake the various targeted organizational changes listed above:

- Effective implementation of activities necessary to achieve climate change action goals and objectives;
- The CAO, Mayor, Council and Committees of Council will have administrative support, allowing for additional rigor and consistency that will enable all individuals and Committees to work to their highest levels.
- There may be some potential efficiencies gained via the consolidation of the Payroll and Benefits function within the Human Resources Branch.
- Ability to further grow and mature the Human Resources Branch in a manner that suits the future growth and development of the Town.

4.6 Recommendation 4: Defining Customer Experience for the Town

4.6.1 Overview of Recommendation

Customer service is a core activity that is performed by almost all teams, in some fashion, throughout the Town. Whether customer service is delivered through staffing a public-facing desk or it is through staff engagement with the public through queries, payment activities or other in-field interactions, there are several forms of customer service provision in Bracebridge. While multiple groups did mention there were general and/or informal goals associated with customer service standards, no team was able to provide a policy, guideline, service level agreement, or other codified document that explicitly stated – at either a department or corporate level – the expectations, timelines, and activities expected when engaging with the public. It is important to note however, that there are a number of municipal services for which Provincial Regulations are used to guide service levels. A specific example of this would be references within the Ontario Building Code regarding the period within which permits shall be issued or refused, based on class of building (i.e., within O.Reg 332/12). Similar examples exist in other sections of the Ontario Building Code Act, 1992; the Planning Act, 1990; Municipal Act, 2001, etc. Leadership noted that these statutory obligations which include timelines dictate service level opportunities.

While it was beyond the scope of this engagement to conduct direct consultations with residents and businesses in the community, the customer experience at Bracebridge was generally described by staff as a positive one. However, it was also apparent that there are opportunities to further elevate the customer experience. Developing a Customer Experience Strategy would involve creating a unified customer service framework for the entire Town. It would entail standardizing procedures, setting clear service expectations, and establishing a cohesive structure for handling customer interactions. This would also include training for staff to ensure consistency in service quality and developing key performance indicators to measure service effectiveness.

4.6.2 Current State Challenges Addressed

Currently there are inconsistent customer service processes and structures, with some difficulties related to staffing, hours of operation, payment options, service availability by channel, and managing resident expectations. These challenges may result in delays in completing public requests. Furthermore, outside of statutory standards or timelines, there are no service level agreements (SLAs) in place for external customer service or for internal, inter-departmental interactions to support customer service delivery. The interactions and experiences that customers have when engaging with the Town may be inconsistent without a clear understanding of variations between departments or staff. The Town has also not clearly established ownership of the overall customer experience and has not defined a vision for customer experience moving forward. Without a unified strategy for customer experience, the Town is at risk of fragmented initiatives by department and potentially inefficient investments to support piecemeal improvements.

4.6.3 Implementation Considerations

4.6.3.1 Ease of Implementation, Expected Impact, and Cost Drivers

Ease of Implementation



High

Establishing a Customer Experience strategy is a well-defined process for municipalities. The Town can apply existing methodologies to develop and implement its own strategy. Also, it is important to note that the Town is not starting from scratch in this area and can build off of much of the existing practices, processes and structures in place today to formally document standards, KPIs, targets and alignment to Customer Experience principals.

Expected Benefit



Medium

A Customer Experience strategy would generally identify initiatives and activities for medium to longer-term success. However, the strategy would also provide some immediate benefits associated with understanding customer profiles and preferences.

Cost Drivers

Third Party Support: Costs associated with developing a Customer Experience strategy would primarily be driven by third-party consulting costs should the Town decide to engage external support.

Staff Time: The Town could also decide to complete the development of a strategy in-house with existing resources, however implementation may require additional time due to existing staff commitments. The strategy would identify additional initiatives and activities that would require further investments.

The creation of a Customer Experience Strategy could be completed using third-party resources, or internally, as a special project. This could be an initiative for the Town's Management Team to define the scope of work and execute on the development of a strategy. Whether completed internally or through the assistance of a third-party a member of the SMT should be the Executive Sponsor of the work - it is suggested that this be the CAO. Key initial steps for developing the strategy should include:

- **Establishing core guiding principles** that align with the Town's mission and values to direct the strategy's objectives, goals, and resource and technology needs.
- **Defining ownership for the customer experience strategy** and customer experience in general across the municipality. It is generally recommended that this be included within the Office of the CAO to highlight the importance and priority of customer experience and ensure consistency across the organization.
- **Documenting and mapping the current customer experience** and any changing expectations or requirements from the community. This should involve customer engagement as well as existing research including best practices/sector trends from the Institute for Citizen-Centred Services Citizen's First findings.
- **Defining specific, measurable, achievable, relevant, and time-bound (SMART) objectives and goals for the strategy**, with a clear plan for sourcing necessary data inputs, such as customer satisfaction metrics.
- **Assessing the needed resources and technology to support the strategy's** success, potentially including the use of Client/Customer Relationship Management (CRM) systems to monitor all customer service interactions, utilizing the Town's existing software to track inquiries and interactions efficiently.
- **Engaging Internal Stakeholders** – staff and leaders across the Town should be involved in the development of the strategy. The Strategy should reflect and build on ideas from staff, and the process should encourage staff participation.
- **Clear Leadership and Communication** – the importance of the Customer Experience when customers are engaging with the Town should be communicated from the top levels of the organization and departmental leadership. Mayor and Council, CAO and Leadership Team should be continually reinforcing the Town's commitment to a great Customer Experience.

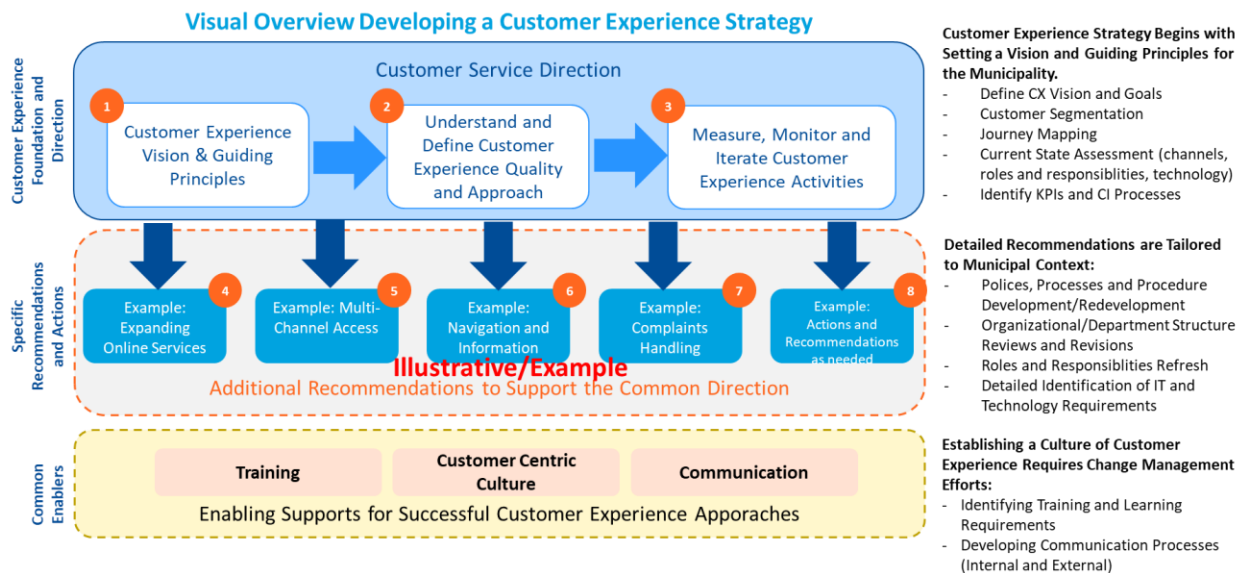


Figure 4 Overview of CX Framework

The figure above outlines components of a Customer Experience Strategy that should be taken into consideration by the Town. The development should begin with a customer service direction before focusing on specific and tangible opportunities.

4.6.4 Change Management Considerations

The development of a Customer Experience Strategy should be positioned as an opportunity to better serve customers of the Town and to ensure staff are best supported. It is important to document the Customer Experience Strategy to enable staff to provide a level of service that residents request and reduce the day-to-day challenges faced by staff. There are a number of activities that should be considered during development of a Customer Experience Strategy including:

- **Acceptance and Adoption of the Strategy:** Without full buy-in and understanding from staff, the strategy may fail to be implemented effectively, leading to inconsistent service delivery and disengaged employees. Mitigation could include:
 - **Clear Communication:** It's crucial to communicate the purpose, goals, and benefits of the strategy clearly to all staff. This helps ensure buy-in from the outset and highlights how the strategy will improve service delivery for customers and ease staff workloads.
 - **Leadership Support:** Gaining commitment from the SMT will be essential to drive the adoption process. SMT will need to model the desired behaviors/principals within the Customer Experience Strategy and act as champions of the Strategy.

- Staff Involvement: Involving staff early in the strategy's development will foster a sense of ownership, helping them understand the value of their role in enhancing customer experience.
- Continuity in Service Delivery Across the Municipality: Inconsistent application of the Strategy can create gaps in service quality, leading to varied customer experiences and diminishing the overall impact of the strategy. Mitigation could include
 - Consistent Application of Standards: A key element of success is ensuring that all departments and teams across the Town have a clear understanding, training and tools to apply the customer experience strategy consistently. This will ensure continuity in the quality of service provided to all customers, regardless of the service or department they are dealing with.
 - Monitoring and Accountability: Set up mechanisms for tracking the consistent delivery of the strategy, using customer feedback and performance metrics to measure adherence to the new standards.
- Training Challenges: A lack of adequate training or addressing skill gaps could prevent staff from fully adopting new processes, resulting in inefficiencies and poor customer interactions. Mitigation could include:
 - Skill Gaps: Identifying skill gaps will be important to ensure all staff are equipped to meet the new expectations. Some staff may require specific training in customer service best practices, communication skills, or the use of new technology.
 - Tailored Training Programs: Training programs should be designed to meet the needs of different departments or roles. For example, frontline staff may need more customer interaction training, while back-office staff might need tools for improved communication or tracking customer satisfaction.
 - Ongoing Support: Training should not be a one-time event. Continuous learning and refreshers, including easy access to resources, are necessary to reinforce the strategy and its long-term success.
- Dealing with Resistance: Resistance to change is a common barrier that can slow down or derail the implementation of new initiatives, reducing their overall effectiveness.
 - Addressing Concerns Early: Resistance to change is natural, so it's important to anticipate concerns, whether related to increased workloads, new technologies, or the perception of micromanagement. Open dialogue and addressing these concerns early will help ease resistance.
 - Demonstrating Value: Share early wins and success stories from the strategy to demonstrate how it benefits both the customers and staff. This can help convert skeptics and reduce opposition.
 - Phased Implementation: Implementing the strategy in phases can allow staff to adjust gradually to new expectations and processes, reducing the feeling of being overwhelmed by large-scale change.
- Continuous Feedback and Improvement. Mitigation could include:
 - Issue Summary: Without continuous feedback, the strategy may not evolve to address emerging issues or changing customer expectations, which could reduce its long-term impact.
 - Feedback Loops: Create opportunities for staff to provide feedback on the strategy and any challenges they face. This will allow adjustments to be made and ensure that the strategy evolves with both customer needs and staff capabilities.

- Customer Input: Use customer feedback to refine and improve the strategy. Understanding customer perspectives can help staff see the importance of their role in delivering a better experience.

4.6.5 Summary of Benefits

Establishing a Customer Experience Strategy would allow for the creation of a clear and prioritized roadmap to achieve:

- **Clarity around customer needs and the ability to prioritize efforts to address these** – there is a wide diversity of cultural backgrounds, ages, and abilities among customers. A clear Customer Experience Strategy will identify these and support the municipality to tailor communication and engagement to meet each different need. With changing demographics and population growth across the province, understanding customer bases and preferences has become increasingly important for municipalities. A Customer Experience Strategy will ensure the Town continues to prioritize high quality customer interactions, accessibility principles (including AODA), the changing nature of how customers wish to interact with the municipality..
- **Clear and aligned activities and investments associated with digital transformation and modernization** – establishing a Customer Experience Strategy will support the Town in clearly planning for digital and technology enhancements related to customer service. A strategy will bring together requirements from across departments to ensure alignment and consistency in application of customer facing technologies. This would include establishing consistency for payment technologies/options across Town departments and facilities.
- **Improved Experiences for Town Customers** – Developing a Customer Experience Strategy would support the Town's efforts for continual improvements and enhancements to the delivery of services by aligning processes, staff training, and communication to meet customer needs more effectively. By clearly defining service standards, improving feedback mechanisms, and leveraging technology, the Strategy would reduce response times, address common pain points, and ensure a more consistent, personalized, and efficient experience for all customers.
- **Enhanced public accountability and transparency** – clear SLAs will support the Town with communications and messaging to residents regarding expectations associated with customer service inquiries and requests and support compliance.
- **Support for staff to deliver high-quality customer service** – A Customer Experience Strategy would identify specific gaps and opportunities associated with staff expertise to deliver customer services. Providing staff with the tools and knowledge to best deliver customer services will support staff morale by further enhancing their ability to deliver services in an environment that can be challenging and with limited resources.

4.7 Recommendation 5: Review and Implement Technology for Operations Teams

4.7.1 Overview of Recommendation

The Town is periodically reviews and evaluates different technologies to enhance and support the activities of its staff. This includes considerations to move away from a reliance on paper-based activities and/or outdated/no technology. When discussing technology strengths and challenges with staff, operations teams most commonly identified potential concerns (i.e., staff who are working outside of an office environment), with specific focus on By-Law Enforcement, Building Inspectors and Property Standards Officers (who are in the process of transitioning to an e-permitting system), Fire Services, and to a degree, Public Works Operators and Parks staff.

The Town should continue to work with a focus on identifying digital solutions for various operations teams. This should include the mapping/documentation of existing processes, including the use of current technologies, to determine whether systems should be upgraded, replaced, or left as is. Rather than digitizing current workflows without change, the goal should be to redesign processes for efficiency. The Town will need to develop a business requirement document to outline essential needs, and may wish to develop an RFI to gather vendor information on potential technologies. While no single technology will be the solution for all groups, each department will want to review the suite of technology currently in use to develop a “wish list” for a future solution.

This approach will take time and effort for each process/system that is intended to be digitized, however, it will ensure that the various teams at the Town receive the best tools for the job.

4.7.2 Current State Challenges Addressed

While each operations team has its own unique issues, the common characteristics that were identified across engagement activities with each team included:

- Staff noted that they frequently have to fill out any findings, infractions, or citations via paper-based system. It was noted that at points this can be difficult in inclement weather, especially if there is a concern that the individual receiving the document might not remain if the staff member goes to a dry place to write.
- It was noted that some paper-based content would then be transcribed into the computer at the office afterwards, which adds unnecessary time for team members.
- Paper-based systems were seen as more time consuming and difficult to write clearly, neatly, and to then store for the required amount of time.
 - Storing of copies was also noted as potentially challenging as it requires teams to come into the office at the end of the shift, when they may have been a relatively far distance from the office.
- Paper-based systems make it nearly impossible for field staff to know if an individual or issue has already been reviewed, cited, or approved. Staff would have to rely on other team members being in the office and being able to review filed paperwork.

4.7.3 Implementation Considerations

4.7.3.1 Ease of Implementation, Expected Impact, and Cost Drivers

Ease of Implementation



Low

The selection of technology tools, including the necessary pre-work, will be time intensive and will require dedicated effort of staff. Additionally, it will be costly to actually purchase and customize the technology so it fully meets the needs of the Town. For this reason it is seen as difficult to complete, and will need to be treated as a dedicated project to achieve full success.

Expected Benefit



High

If successfully implemented, new technology has the opportunity to drastically alter the working processes of in-field teams, enhancing productivity, searchability, and removing the reliance on paper broadly.

Cost Drivers

Staff Time: Staff will require a dedicated effort to define the needs of each of the teams, map the processes, identify ideal future state processes and integrations with other systems/teams, and document this into a Business Requirements Document. Further time will be required to research potential solutions and then move through the procurement process.

Technology Costs: The procurement of new technologies, as well as the associated costs to customize and implement these will vary depending on the tool but may be a large cost for the Town to undertake.

Below provides additional information on how the Town may want to consider moving this recommendation forward:

- Identify the core process(es) that the team wants to move towards a digital solution.
- Map all processes to understand the current state, including where there is any technology intervention.
 - If technology is included today, examine whether the existing system will need to be integrated into any future processes, if the existing system will be removed, or if there is no interaction.
- Review the current state process to identify if/how this should be changed by a new technology solution.
 - Note: A common challenge for many when digitizing processes is they try to rebuild the exact process today in digital format. However, doing this will only

negatively impact the ability of the team to undertake continuous improvement activities, and may very likely create a situation in which the new system actually hampers efficiency and productivity.

- Instead, the question should always be, “How can we use this new technology to remove unnecessary activities, drive efficiency, reduce barriers today, and make our team more effective?”
- Develop a Business Requirement Document that clearly defines the “Must Have” items, the “Nice to Have” items, and the “Do Not Want” items. This will help to set the scope for what technologies should be reviewed in advance of any potential procurement processes.
 - Furthermore, if and as possible, departments should explore the possibility to jointly use a new technology. This can help to offset costs and achieve multiple goals in a single process.
- Create a Request for Information (RFI) document that is sent out to the public and/or targeted businesses to understand their solutions, including the scope, scale, cost, and functionality.
- Create a shortlist of potential solutions and undertake a full Request for Proposal process by which they are reviewed and evaluated (including live demonstrations of the tool, as well as additional implementation and customization activities).
- Prior to finalizing to the procurement and implementation of a new tool, ensure that the selected tool will align with other critical systems to reduce paper workarounds, minimize the chance for human error, and drive greater efficiency in end-to-end process workflows

4.7.3.2 Selecting a Technology Tool

Implementation of any new technology is an exciting activity that has the potential benefit of greatly reducing staff workload on low-value activities, to instead focus on items that are of greater value and/or skill level. Technology can be a fantastic way to find additional staff capacity and have it used in a manner that works to the fullest of their qualifications and ability.

One of the greatest items to consider when it comes to implementing new technology is the need to ensure it will not create additional or new burdens for your team inadvertently. Oftentimes, many technology implementations are done in a manner that does not properly identify the full suite of needs and integrations required, or is done in a manner that does not customize the software to meet the full end-to-end requirements. The result is that organizations then create new manual processes to either workaround challenges in the system, to link two disjointed processes or systems, or to verify the information. To this end, creating a fulsome Business Requirements Document will be a critical step that should not be undervalued, as it will create better outcomes for the teams.

When implementing the new technology, the Town should identify at least one staff member per shift/rotation time to act as a “super user” for the tool. This individual will act as a go-to for any questions, comments, or concerns that other users may have, and will be the first line of troubleshooting defense. This individual should support the development of a customized manual for the tool’s operations, ensuring there is a clear understanding of how the tool is used in conjunction with other systems/tools, as well as the core/common activities expected to be completed. This way there is standardization for how the tool is used, a common understanding

of its linkages, and the ability for the team to then consistently review and improve its processes broadly.

4.7.4 Change Management Considerations

As the Town operates in a constrained fiscal environment, the Town will want to strongly consider the full suite of options for potential funding for new technology.

Beyond these, ensuring that there is a clear training period provided and opportunity to roll in technologies in a time that allows for sufficient learning will be important. This was a challenge that was noted with Public Works Operators for the new timesheet software, feeling that they did not have a sufficient period to learn the new system before it was the only option provided. Ensuring there is sufficient time to learn the system and get comfortable with it will support the uptake of the teams using the software.

Another challenge from the past that the Town will want to consider will be ensuring there is a clear understanding of why new tools or software is being implemented. A question heard when engaging Public Works Operators was, “What problem is this new timesheet solution supposed to solve? Whose life gets made easier by this?”. So being clear for staff members about what and why technology is changing will support greater buy-in and transparency for staff.

4.7.5 Summary of Benefits

Bracebridge could reasonably expect the following benefits from the review and implementation of enhanced technologies for operations staff:

- Increased productivity of in-field staff members by ensuring they have the appropriate tools and supports necessary to quickly review existing citations, issues, or other information, as well as issue orders/citations as appropriate;
- The ability to remove physical storage costs for copies in the future, as all records will be saved in the electronically;
- Improved morale for teams who receive updated technology; and,
- General efficiency and effectiveness gains for staff in departments receiving updated technology.

4.8 Recommendation 6: Refresh and Formalize Corporate Performance Indicators

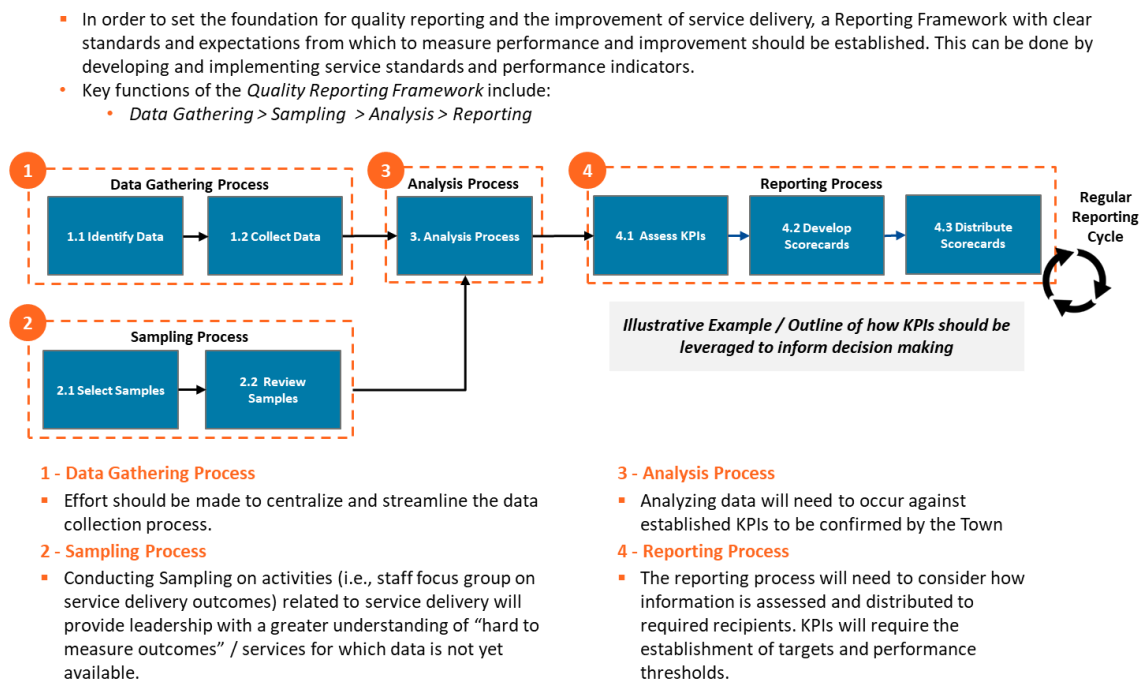
4.8.1 Overview of Recommendation

The Town should consider refreshing and giving renewed prominence to the use of corporate performance indicators, through the use of a corporate scorecard, to help review and evaluate corporate performance. This should not be a fundamental restart, ignoring the existing indicators and work that has been done in the past, rather, focused on reviewing:

- What was previously in place?
- What may be missing today?
- What is no longer necessary or relevant?
- How can we tell the story of our team's performance in an efficient and effective manner?

To help determine any indicators that may not be as applicable today, and/or those that may be missing, the Town should use its existing Strategic Plan and broad goals and objectives contained within the plan to define targets/KPIs. If there are aspects of operational efficiency, preparing for the future, or customer experience (as examples), that the Town wants to highlight as part of its story, it should ensure that there are indicators which drive that forward in the future. The following graphic outlines how performance indicators can support broader decision-making in the future.

Figure 5: Indicator influencing decision-making



4.8.2 Current State Challenges Addressed

The Town's existing balanced scorecard is underutilized and represents an area for improvement. The scorecard provides a strong starting point to elevate the level of reporting completed by the Town to demonstrate progress against achieving broader goals. Relaunching the balanced scorecard, with a direct link to broad objectives described in the Strategic Plan; Council Priorities; and Annual Business Plan objectives would address gaps in reporting. This would also provide a source of evidence to staff and Council for discussions regarding the prioritization and resourcing of initiatives (i.e., allow for the comparison of expected outcomes to the Town's balanced scorecard). Other challenges that exist today include:

- An inability to clearly and objectively see if/where there are teams that require greater support from the Town to achieve alignment with Town goals; and,
- The Town's ability to show Council or residents the results of their efforts throughout the year and/or across multiple years.

4.8.3 Implementation Considerations

4.8.3.1 Ease of Implementation, Expected Impact, and Cost Drivers

Ease of Implementation



Medium

The ability to clearly tell the story of Bracebridge's progress against broader objectives across the immediate and longer-terms will be beneficial to showing staff efficiency and effectiveness to Council, leadership, and the public broadly. This can also potentially identify if/where new or additional supports or focus is required.

Expected Benefit



Low

While this will have some impact on broader decision-making and overall communications for the Town, it is unlikely that this be the cause of massive shifts in focus, attention, activities, or structures. Rather, this will be another input to help drive broader decision-making as appropriate.

Cost Drivers

Staff Time: Reviewing the existing indicators and setting objectives/drivers for future indicators should not be a massive effort, but will require dedicated time.

Technology Costs: Potential need to adjust existing systems or processes to enable required data pathways that will provide necessary information to drive indicators.

Third Party Costs: If desired, third party consultants could support this task to expedite the process, while also raising costs compared to the staff-led option.

4.8.3.2 Process to Select and Implement Indicators

Refreshing the Corporate Performance Indicators/Balanced Scorecard is a process that can be relatively quick and easy to action. An initial step should be determining the core goals or objectives the Town has for its monitoring activities. Specifically, the Town should align the process to the existing strategic plan, Council's priorities and the annual business plan.

Once the full suite of objectives are identified, the Town will then want to review the existing/previous set of performance indicators to determine what aligns with the updated objectives, and where there is a need for new or updated indicators to track areas not previously contemplated. Setting indicators should be a process that balances output measures with outcome measures, ensuring there is a balance between knowing what the Bracebridge team is *doing* vs. what it is *achieving*.

With ideal indicators selected, the Town's team will want to review the data collection processes/mechanisms. This step will ensure that the team is able to effectively collect the necessary data required to report on the desired indicators. If these do not exist today, the team will need to determine how it will change existing structures and processes related to data collection and the output/analysis to ensure that in the future it can accurately report on its desired indicators.

Lastly, once the indicators and their data sources have been confirmed, the Town will want to determine how often the indicators are reported against. Some indicators may be best presented on an annual basis, while others may be appropriate to present quarterly. Once determined, the Town should follow through and ensure that the appropriate audience see the indicators on the desired cadence, to drive transparency and support trust with Council, staff, and the public.

4.8.4 Change Management Considerations

Change management for this recommendation is expected to be relatively simple, with the biggest items to consider including:

- Defining the appropriate roles and responsibilities for the collection, interpretation, and presentation of indicator data;
 - This process should ensure that there is no question about who is responsible for each aspect of the Scorecard, making it clear how and when this should integrate into their existing roles and responsibilities.
- Defining the appropriate audiences for the Scorecard;
 - Identifying if there are aspects that should be maintained for different audiences, and ensuring the appropriate mechanisms are in place to support those audiences.

- Developing mechanism to report on performance;
 - The Town should establish processes for reporting progress to both internal and external stakeholder. Externally, progress should be shared with the public via accessible channels such as the Town's website, newsletters, or public meetings, ensuring transparency. It is highly recommended that the Town use visual tools like dashboards or scorecards to illustrate performance against key metrics. This can help promote an understanding of information for stakeholders.
- Clearly explaining what is and is not being measured, and why;
 - There will likely be questions by some staff, as well as by the public/Council as to why this is being undertaken now, and what the benefit is to the day-to-day efficiency and operations of the Town. Furthermore, there will be questions about what is and is not included in the scope of the Scorecard. The Town will need to be clear about what this entails and the reasons for it will be critical to the success of the initiative.

4.8.5 Summary of Benefits

Bracebridge could reasonably expect the following benefits if they undertake activities to develop an enhanced corporate reporting/balanced scorecard process:

- The ability to effectively show the activity and effort of the Town's team, including making progress on longer-term initiatives.
- Insights into performance trends, helping to identify areas of success and those needing improvement. By tracking and analyzing progress against current goals, the Town can make data-driven decisions that inform future goal setting, ensuring that new objectives are both realistic and aligned with strategic priorities.
- The ability to more accurately track resource allocations, ensuring that the information is provided in a clear and transparent manner to allow for targeted support or changes, if and as necessary.
- The ability to communicate to staff, Council, and the public using data and evidence.

5.0 Broader Implementation & Prioritization Considerations

This section is designed to provide insights as to how implementation for the full suite of recommendations can be actioned. While the above section provided individual implementation considerations, this will take the suite of recommendations as a whole and will use this to help structure and organize how the Town can move forward at the conclusion of this engagement.

5.1 Implementation Phasing Methodology

includes information on the criteria to assess Expected Benefit and Ease of Implementation for each recommendation. This assessment supports the implementation planning of recommendations.

Broadly speaking, when determining phasing and prioritization, it is helpful to consider a two-by-two that helps to identify quick wins, as well as the recommendations that will take longer periods of time to be successful. This will help the Town to understand what can be used as a momentum generator for success. In this instance, the prioritization criteria used is depicted in the graphic below.

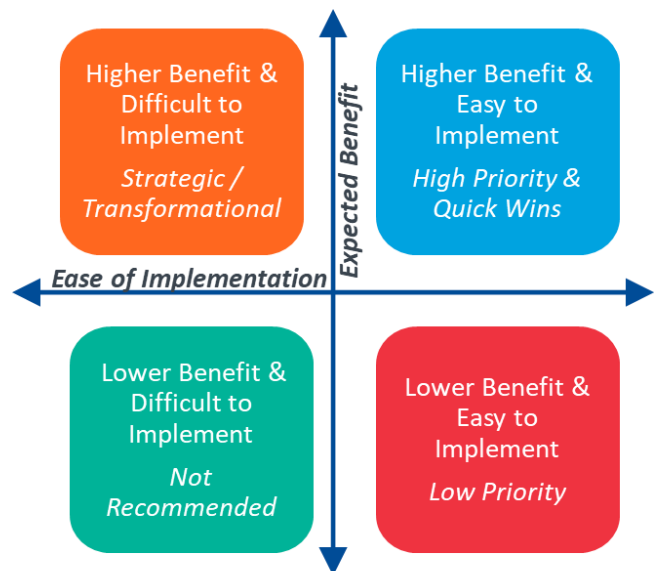
Prioritization Criteria

A. Expected Benefit

1. Improved Staff Efficiency
2. Improved Resident Experience
3. Expected Cost Savings

B. Ease of Implementation

4. Ease to Address
5. Expected Timeline
6. Implementation Cost



To better understand each category and its various scoring options, the following definitions have been provided:

Using this criteria, the Optimus SBR team has reviewed each opportunity and scored it as defined in the table below:

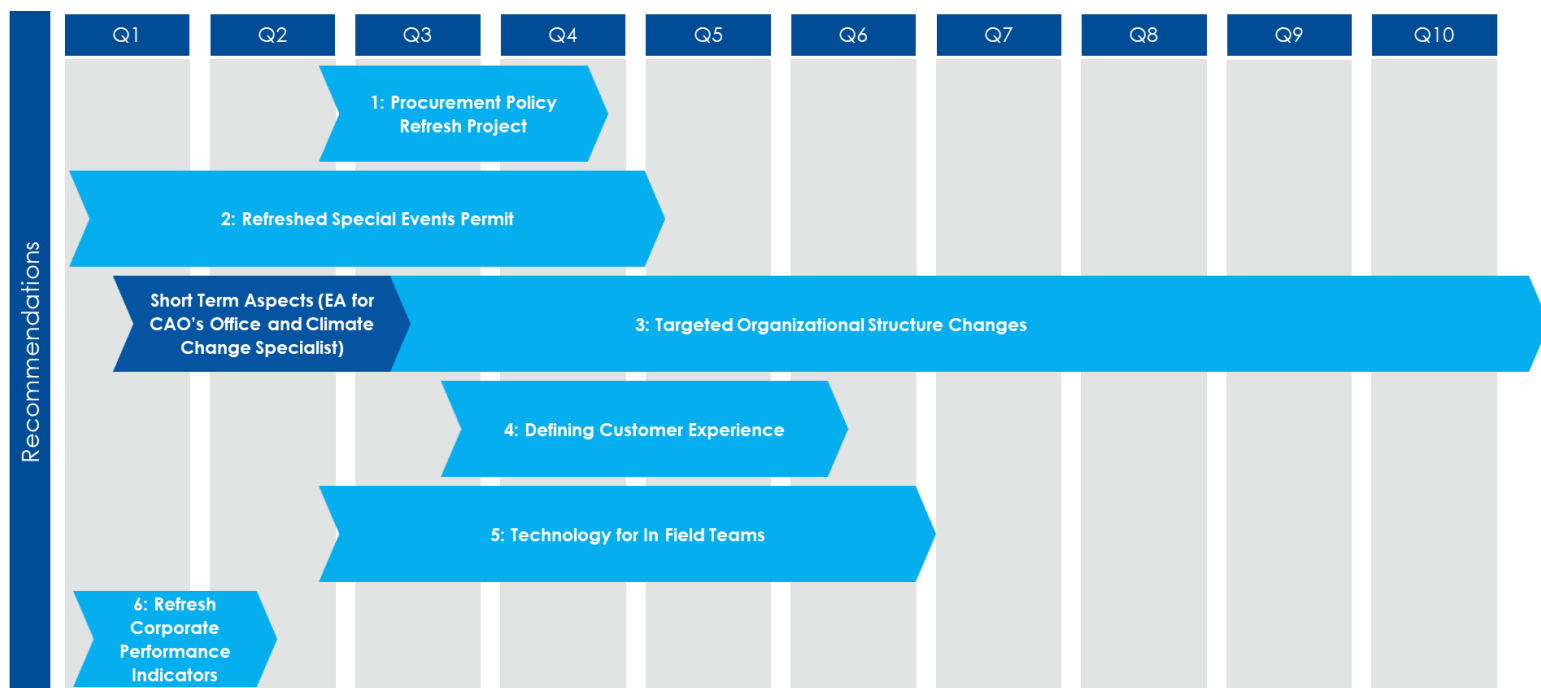
#	Recommendation Title	Ease of Implementation	Expected Benefit
1	Complete Procurement Policy Refresh Project	Medium	Medium
2	Refreshed Special Event Permit Processes, Structures, and Policy	Medium	Medium
3	Targeted Organizational Structure Changes to Support Continuous Growth and Staff Performance	Medium	Medium
4	Defining Customer Experience for the Town	High	Medium
5	Review and Implement Technology for In Field Teams	Low	High
6	Refresh and Formalize Corporate Performance Indicators	Medium	Low

5.2 Proposed Implementation Phasing

Using the methodology described above, the Optimus SBR team has developed a Gantt chart to visually depict how the Town may want to structure the implementation of its recommendations. The Gantt chart below looks to balance quick win opportunities with longer-term effort activities. Furthermore, we have attempted to balance the workload, to not overwhelm staff at any one point in time.

It is important to note that some activities will take an extended amount of time, as they may require greater amounts of research, planning, or development. We have provided longer timelines in these instances. If it ends up taking a greater length of time to complete a task, the Town can simply postpone other follow-on activities as appropriate.

Figure 6: Suggested recommendation implementation phasing Gantt chart



To orient readers to the Gantt chart above, the timing starts at “Quarter 1”. This does not imply calendar quarter 1, or fiscal quarter 1. Rather, the first quarter is whenever the Town begins working through the recommendations. If the Town were to begin working on implementation of the suggested recommendations in October, that would be the start of Q1. Furthermore, timing for recommendations is based on an assumption that all activities are completed in-house and do not employ third party supports to expedite activities. If third party supports are employed to support the work, this may expedite the execution of activities, but could add time to the process due to procurement requirements.

The recommendations presented above are designed to balance the need for quick wins against longer-term activities. To this end, Recommendation 6 – Refresh Corporate Performance Indicators – is suggested as an early activity for the team, as it is a relatively quick activity that should be able to demonstrate some initial progress and wins for the team. Similarly, Recommendation 2 – Refreshed Special Events Permit – is slated to begin during a portion of the year that traditionally has less events occurring, allowing staff to allocate time to implementation.

Recommendation 3 – Targeted Organizational Structures – demonstrates a very long tail. This is because the various aspects of the recommendation include short, medium, and long-term considerations. However, the initial short-term considerations, specifically focusing on providing support to the CAO’s Office, Mayor, Council and Committees of Council with an administrative resource are suggested to happen relatively quickly. These two changes to the organizational structure will have a large impact on senior leadership and broader staff teams.

Other items are designed to balance the need for short-term progress against staff time and effort as the teams will balance their existing workload with these special projects. To this end, the timing of these can be flexible, and if desired, can be delayed if staff are in particularly busy periods.

6.0 Appendix

6.1 Appendix A – Additional Information on Recommendation 1

Modern Procurement Requirements

To support the Town update its procurement policy so that it aligns with more modern requirements and leading practice, the Optimus SBR team has prepared the following, more in-depth guidance related to recommendations discussed in section 4.3.1.1:

Updating the policy to include modern procurement vehicles, refresh and clarify roles and responsibilities for staff, and enable more efficient procurement activities. With updated vehicles in place, the Town will be in a position to more effectively decide on the most appropriate procurement activity available. This will also provide the Town with the ability to ensure its procurement activities align with its overarching strategies and goals as a municipality, while aligning with legislative contexts and leading practices.

Specific items to consider include:

- Vendors of Record
 - The Public Works Department regularly uses Vendors of Record for services that may require short notice support (e.g., plumbing), however, this efficient and effective procurement vehicle is not explicitly listed in the existing procurement policy.
 - While it is understood that this method of procurement is known to the Town, including this option in the Policy will ensure there is a common understanding of what a Vendor of Record is, how it can be structured, and the benefits it can provide.
 - A Vendor of Record will enable the Town to have a faster, easier procurement process for either goods or services that are frequently purchased.
 - Vendors of Record effectively create prequalified lists of suppliers who can support the Town for a number of tasks for periods ranging from 1 – 5 years.
 - These systems usually will make it clear that the Vendor of Record is not a guarantee of activity for proponents (even those who qualify), and that those proponents who do qualify should not expect a minimum level of work as a result of prequalifying.
 - It should be noted that the prequalified list of suppliers is not included in the policy itself, but rather is kept outside of the policy, with an appropriate delegate (e.g., the Treasurer). The policy should make mention that this procurement method exists.
 - These are effective tools as they allow the Town to identify preferred suppliers and can reduce the need to source three or more quotes if it is known that a prequalified vendor is able to effectively meet the needs of the Town.
 - The administration of the Vendor of Record can take shape in three different ways, depending on what the Town desires:

- **Secondary RFx Processes:** Once an initial list of vendors is approved, secondary RFx processes are issued to the entire group, or a subset of the group.
 - These usually request more specific information, such as exact processes that would be used to address a specific challenge, binding quotes, or the name of staff who would provide services.
 - The Town would then review all responses and select a bidder dependent on previously developed evaluation criteria, which would be specific to the project in question.
 - **Sequential Awards:** Once an initial list of vendors is approved, the Town would move through the list and award contracts or request quotes in a sequential manner.
 - The list could be organized alphabetically or in some other manner, but the core of this is that each contract to be issued is issued in sequence. Once the full list has received a contract, the Town would once again start from the beginning, and would continue the process.
 - **On-Demand, Rate Approved Services:** Where one or more vendors prequalify to provide support on a specific task on an on-demand format (e.g., snow plowing or HVAC support).
 - The vendors' hourly rates are guaranteed through the initial procurement process, and they are now "prequalified" to be contacted for on-demand services.
 - In the event that the first proponent on the list is unable to provide the on-demand service for any reason, the second individual can be contacted.
 - The selection of which model to use would be based on the Town's needs, and what it believes to be most beneficial for its purposes.
 - Regardless of the model selected, the Town will need to be clear with potential proponents at the outset of the pre-qualifying stage how future work will be distributed.
- It should also be noted that the Town could avail itself of provincial Vendors of Record, should it wish.
 - **Free Trade Agreements**
 - Updating the policy (or supporting procedure documents) to include the specific free trade agreements that are included will support staff to ensure they know what processes and requirements should be included.
 - When looking at the current landscape, the two primary Free Trade Agreements that impact Ontario municipalities include:
 - **Canadian Free Trade Agreement (CFTA)** (previously the Inter-Provincial Trade Agreement)
 - A threshold of approximately \$100,000 will trigger the application of this trade agreement.
 - **Comprehensive European Trade Agreement (CETA)**

- A threshold of approximately \$336,000 will trigger the application of this trade agreement.
 - Note: the application of these Free Trade Agreements applies differently to construction and services (e.g., consultancies).
- To reflect potential changes to these agreements, the Town should ensure that there is reference to trade agreements superseding the Town Policy.
- Local Preference clauses
 - Local preference clauses have recently re-emerged into the procurement landscape, especially in light of economic challenges and the prevalence of national or provincial tendering platforms.
 - These are challenging and potentially divisive clauses as they can be seen as exclusionary and/or creating barriers that may run counter to international trade agreements.
 - At this point, the Optimus SBR team, recommends not including these in any procurement policy, however, if this is desired in the future, this should be developed in conjunction with legal support to ensure that it does not inadvertently create legal challenges for the Town.
- Fairness Monitor services
 - These are neutral third parties that can be brought in on contract to act as an independent reviewer of high cost, complex, or politically sensitive procurements.
 - The role of a Fairness Monitor is flexible, and often begins at the Rfx development stage to ensure that there are no unintended or intended biases towards any group of or individual proponents. This role can then be used to help respond to requests for clarification from proponents, if engaged early enough. Alternatively, some Fairness Monitors can be engaged at the evaluation stage to ensure that there are appropriate activities included to drive the selection of a preferred proponent.
 - While not used on each engagement, they provide an additional level of security for the Town when they are used, and furthermore, can provide additional confidences to potential proponents during the process. The decision to use fairness monitors should be based on a project achieving an appropriate threshold of complexity, scale, cost, or historical/known potential contention within the sector of proponents.
- Environmental/Green Procurement clauses
 - These refer to the practice of purchasing environmentally preferable goods or services that will have a reduced impact on the environment over their life-cycle. This can include items such as reducing the amount of paper copies for a report or exploring environmental alternatives to existing goods.
 - An important consideration will be to ensure that green procurement takes place in the context of achieving value for money, and that there should be a true evaluation of the good/service being procured to ensure that considerations for planning, acquisition, use, and disposal are contemplated.
- Enhancing the definitions/use cases for procurement vehicles
 - At present, the existing policy does have some definitions/explanations of how and when to use the noted procurement vehicles. However, there should be a review and refresh of the content that is included in the policy to provide tangible

definitions, examples, use cases, and procedures to appropriately protect the Town from potential vendor challenges.

- A general clean up and refresh of language and stipulations (e.g., posting requirements).
 - There are a number of areas where, due to changing operations and activities, the content in the policy is no longer aligned with operational realities. A clear example is the advertising requirements, where the current policy suggests a local newspaper as a source of advertisement. Given that the Town now uses Biddingo, this clause should be amended to remove “local newspaper” and replace it with “digital procurement platform”, as an example.

Procurement Policy Draft Content

To support Bracebridge in this process, Optimus SBR has included sample verbiage for some sections that are currently absent in the Town’s policy. This is meant to be a starting point, and not a finished product.

Vendor of Record

A Vendor of Record (VOR) arrangement means a procurement arrangement, typically established through a Request For Proposals (RFP)/Request for PreQualification (RFPQ) that authorizes one or more qualified vendors to provide goods/services for a defined period with defined terms and conditions, including pricing, as set out in the VOR agreement.

Town of Bracebridge VOR arrangements without pricing shall be approved by the [Insert Role Here]. In the case of VOR arrangements where pre-set pricing is included, the approval shall be in accordance with the Procurement Thresholds, based on the estimated value of the VOR during its full term.

Where applicable, especially for frequent purchases of a particular good or service, or where the Town will receive a discount or rebate based on volume purchasing, a VOR will be used as the source for procurement. The Vendor of Record Agreement may be either the Town’s own competitively established VOR or one of the Ontario Ministry of Public and Business Service Delivery (MPBSD) VORs available to municipalities.

Procurement of goods or services by Town staff through a VOR must be acquired in accordance with this Policy and pursuant to the following guidelines:

- a. *VOR procurements valued at less than \$TBD may be contracted without further competition;*
- b. *VOR procurements valued at greater than \$TBD will be in line with requirements outlined in the VOR selection process.*

Sustainable Procurement

Sustainable procurement is a purchasing process that takes into account the economic, environmental and social impacts of the Town’s spending and operational activities.

The Town recognizes that through its procurement function it has the authority to bring about environmental and social improvements both locally and globally while maximizing economic benefits. However, as responsible stewards of the community, all procurement related actions

taken, and decisions made by the Town's employees and Members of Council must also be made in consideration of the financial implications of a particular procurement. Wherever possible and fiscally responsible, the Town encourages and promotes sustainable procurement.

[Appropriate levels of Staff] are responsible for considering the addition of sustainability-related specifications to their procurements and ensuring that the financial implications have been considered and adequate budget is available].

Fairness Monitor

The Town may elect to utilize a fairness monitoring process for specific procurements that are complex or high profile or of a substantial dollar value. In such cases, the Town may engage a Fairness Monitor as an independent third party to observe all or part of a procurement process, to provide related feedback on fairness issues to the [Role], and to provide an unbiased and impartial opinion on whether the procurement process was conducted in accordance with this Policy and the principles of openness, fairness, consistency and transparency. The decision to engage a Fairness Monitor is at the discretion of the [Role] in consultation with the procuring Head of Department, and will be executed in accordance with this Policy.

Future State Considerations

6.2 Appendix B – Opportunities to Improve Bracebridge's Current State

While the above demonstrates a strong platform to build upon for the future of Bracebridge, opportunities were identified that could enhance the Town's operations. These were reviewed and discussed with the Bracebridge team, however, not all were determined to be appropriate to develop into full recommendations at this time and should continue to be monitored. The opportunities identified through this process included the following:

6.2.1 Interdepartmental Collaboration Can be Challenging

6.2.1.1 Overview:

All stakeholders engaged noted that there is a need for at least some level of collaboration and coordination with other groups to effectively complete their roles. However, it was noted by some staff that there are a series of challenges associated with collaboration, especially across departments, that negatively impact the employee and frequently the customer experience. Below are some of the core challenges that were frequently raised as a barrier to effective collaboration between staff.

It should be noted that this challenge was the most common issue raised across the organization, and is an underlying driver of recommendations presented in [Section 4](#) below.

6.2.1.2 Specific Opportunities:

Onsite and Virtual Work Environments

Like many municipalities, the Town's workforce is located across multiple sites – primarily the Municipal Office, Sportsplex, Memorial Arena, future Muskoka Lumber Community Centre, and Fire Stations 1 and 2, as well as various worksites throughout the municipality. Some comments indicating the presence of Department silos were noted, with physical separation cited as a contributing factor. However, the nature of operations will prevent co-location of all staff; therefore, efforts should be made with respect to communication and processes/procedures to facilitate collaboration.

- A common challenge that was frequently cited is the new phone system that was recently implemented. Given the realities of a hybrid working environment for some teams, it was often raised that phone calls and/or emails are critical to ensuring work is completed in a timely manner. However, it was frequently noted that not all staff have set up their phones correctly, and as such, some individuals may be virtually unreachable when not onsite in the office. This is a core challenge raised by stakeholders across the organization.
- It should also be noted that all staff expressed commitment to prevent silos across the organization and do desire a high-level of collaboration with peers from across the Town.
- Within the Municipal Office, there are some space constraints as the staff complement may be outgrowing the footprint of the building.
- The Town has recognized the challenges related to coordination and communication and adopted a Corporate Communications Strategy in 2021. Since then significant progress has been made toward the objective of "Ensure Internal First." Starting in mid-2022, recurring meetings have been held between the Communications Coordinator and departmental representatives to prioritize communications needs and enhance coordination. In October 2022, a staff survey helped identify areas for improvement in internal communications, shaping ongoing updates. In addition, efforts have been made to celebrate staff achievements both internally and externally, with positive community engagement. The Communications Coordinator also manages an annual calendar to ensure that recurring campaigns and key dates are well-coordinated across communication channels.

Evolving Organizational Structure

The Town is going through a transitional phase with organizational growth in some departments, and employee turnover in other areas, resulting in uncertainties among new employees regarding communication protocols and appropriate contacts for specific queries. This situation highlights the importance of enhanced internal orientation programs and the effective dissemination of information to ensure clarity and confidence among staff. Beyond new staff members, as there are changes internally, it will be important to have clear communication channels between existing staff to outline potential role changes, responsibility changes, and other critical pieces of information that will enable effective collaboration and activity with other staff members.

Defining Roles for Better Collaboration

There are opportunities to review and enhance roles and responsibilities for some Departmental initiatives particularly related to situations that require interdepartmental collaboration. A more

structured approach to collaboration is necessary, where staff can work together effectively, supported by prompt responses and clear communication channels. Staff are committed to effective service delivery and collaboration, but believe more defined processes could better enable service delivery.

6.2.2 Succession Planning

6.2.2.1 Overview:

The Town should be prepared to manage challenges related to senior and long-tenured staff turnover (a challenge faced by many municipalities) and the organizational knowledge deficit this can create in the workplace, the Town has historically not had explicit, dedicated, and codified succession plans. Stakeholder engagement activities noted that this has resulted in sometimes unclear transitions, as well as challenges related to potentially rushed transition processes for successor staff members.

6.2.2.2 Specific Opportunities:

Proactive Succession Planning

Leadership across the Town raised the need for proactive succession planning. It was noted that the Town has an aging workforce and has experienced some retirements in recent years and will experience more in the future. There is an opportunity to create a formal succession planning document that outlines each of the roles that are likely to turn over, and begins to document key processes, activities, and job descriptions so that any potential successors (internal or external to the Town) can effectively take on the role.

6.2.3 Recruitment and Retention

6.2.3.1 Overview:

As the Town continues to grow, there will be a continued need to have a clear, efficient, and effective recruitment process. As staff are onboarded, the Town will want to continue to provide its teams with a hospitable and effective working environment. Through stakeholder engagement sessions, the number of engagement activities that have been undertaken for the past number of years was noted, as was the importance in determining how to be the most attractive employer for talented individuals in a relatively constrained market.

6.2.3.2 Specific Opportunities:

Employer of Choice Mindset

The Town already has a strong foundation to becoming an employer of choice in the area. Efforts should continue to foster a positive and inclusive workplace culture and invest in employee development. Existing opportunities should be clearly communicated to staff and candidates with feedback on new opportunities welcome and considered. Through professional growth opportunities, recognition programs, and a focus on employee well-being, the Town should continue to work towards maintaining an environment where staff feel valued and supported. In the spirit of continual improvement, there is an opportunity to build on these strengths by

continually engaging with staff to identify barriers to engagement and preferences for professional development.

Sustaining Staff Tenure

The Town's recent recruitment initiatives have brought in new talent to the organization. This highlights the importance of not only attracting but also retaining staff. Given the specialized nature of some of the Town's roles, there is a desired effort within the Town to continue investing in all staff development with an emphasis on training for the specialized functions of the Town services. This investment is twofold: ensuring long-term retention and fostering employee engagement. The focus is on creating an environment that draws skilled professionals while encouraging their continued growth and commitment to the organization.