

# ■ CORPORATE SERVICES

AS APPROVED ON DECEMBER 15, 2020



# CORPORATE SERVICES

## Overview

Corporate Services provides effective and efficient administrative support and customer service to the Corporation, Council, Committees and the Community. This department is also responsible for special projects and strategic initiatives that drive organizational excellence and innovation in support of being a progressive community with small town charm.

## Corporate Services organization

The department has six divisions each under the leadership of a functional Manager who report to the Director and one division reporting directly to the Director. These divisions are:

**Legal Services** provides a full range of legal services to the Corporation, Council and the Executive Leadership Team such as legal advice, interpretations and opinions, Legal Services is also responsible for reviewing agreements and by-laws, handling litigation and insurance claims and risk management matters.

**Legislative Services** provides key administrative support services to Council and its Committees, many of which duties are statutory in nature as prescribed by the Municipal Act and other legislation. Legislative Services is also responsible for municipal elections, corporate records management and Freedom of Information requests under the Municipal Freedom of Information and Protection of Privacy Act.

**Human Resources** provides services and support to the Corporation in respect of human capital investment. Services include Human Resources policy, compensation and benefits, talent management and recruitment, training and development, occupational health and safety, workplace wellness and employee and labour relations.

**Information Technology** provides technology services and support to the business units, project services for all technology initiatives and IT infrastructure management. The IT division leads the Town's effective and innovative use of technology to become a progressive municipality that delivers exceptional and modern digital services.

**Bylaw Services** promotes healthy, safe and harmonious communities through education, investigation and resolution of bylaw related matters. Bylaw is directly responsible for property standards, clean yards, parking control and noise complaints, pool enclosure inspections and issuing business licences and temporary sign permits. Bylaw Services provides enforcement support to other divisions as requested such as tree removal, fouling of roads and other matters. Bylaw is leading a pilot shared services program providing Animal Services to three communities being Aurora, Newmarket and Georgina.

**Access Aurora** is the Towns Corporate customer care centre based on a “We Can Help” model. It serves the community through various channels such as phone calls, walk-ins, e-mails and at pop-up events throughout the year. Responsibilities include responding to general enquiries, customer complaint tracking, cashiering, marriage licenses and civil ceremonies, lottery licenses, road closure permits and corporate mail distribution.

**Corporate Initiatives** has oversight of strategic initiatives and special projects that impact the organization as a whole. Areas of focus include Emergency Management, Excellence Canada initiatives, Accessibility, Diversity and Inclusion and the Project Management Office. These responsibilities fall directly under the Office of the Director.

## Corporate Services operating budget by division

	2020	2021	2022
<b>Budget (\$000's)</b>			
Legal Services	1,568.2	1,741.0	1,921.5
Legislative Services	741.7	790.5	814.8
Elections	92.5	92.5	110.0
Human Resources	961.1	1,093.6	1,115.7
Information Technology	3,109.8	3,301.4	3,461.0
Bylaw Services	635.7	664.9	697.8
Animal Services	265.6	271.3	277.4
Access Aurora	883.9	968.3	992.5
Corporate Initiatives	468.3	484.6	499.7
<b>Approved Budget</b>	<b>8,726.9</b>	<b>9,408.0</b>	<b>9,890.4</b>
<b>Budget Change</b>		<b>681.1</b>	<b>482.4</b>
2020 Approved Multi-Year Budget		9,577.0	9,957.6
Change to Multi-Year Budget		(169.0)	(67.2)
<b>Permanent Full-Time Staffing (FTE):</b>			
Opening Staffing	47.0	52.0	56.0
New	2.0	4.0	2.0
Conversion	3.0	-	-
<b>Approved Staffing</b>	<b>52.0</b>	<b>56.0</b>	<b>58.0</b>
2020 Approved Multi-Year Budget	52.0	56.0	58.0
Change to Multi-Year Budget	-	-	-

## 2020 Accomplishments

In 2020, Corporate Services accomplishments include:

- Electoral System Review completed
- Implementation of new meeting management software, e-scribe
- Successful Implementation of the Corporate Technology Strategic Plan with many identified projects in the plan launched or active. Some projects were advanced due to COVID-19
- Development of Human Resources policies including all COVID-19 policies
- Human Resources Information System (HRIS) scheduled to go live January 2021
- Employee Engagement Survey conducted
- Commencement of a Diversity and Inclusion strategy
- Development of an Information and Communication strategy to ensure compliance with AODA standards effective January 2021
- Monitoring, interpreting, advising and educating the Corporation and Community on Orders issued under the Emergency Management and Civil Protection Act
- Continuation of Bylaw modernization ensuring we are progressive and meeting community needs
- Development of a Corporate Integrated Business Plan in collaboration with the Corporate Management Team
- Continued planning and project initiation in pursuit Excellence Canada Gold certification. Projects include an HR Plan, Change Management process, Innovation Platform, Customer Experience Plan and many more.
- Customer Relations Management (CRM) optimization complete with automated escalation of neglected cases
- Implementation of Project Management software creating a single repository of project scheduling and documentation for project tracking and reporting.

## 2021 to 2022 operating budget

### Overview

The operating budget for Corporate Services is approved to increase by \$681,100 in 2021 and \$482,400 in 2022. These increases are mainly due to staffing requests related to modernization and growth. The Corporate Technology Strategic Plan has identified a significant gap in technology business solutions and identifies the need for additional resources over the next two years to deliver on major projects planned in the near future such as the financial system, Maximo optimization, process digitization and automation. Other staffing requests support growth both internally and externally in Human Resources, Legal Services, Bylaw Services and Access Aurora.

### Operating financial summary

\$000's	Net Actual Results		2020	2020	Approved Budget	
	2018	2019	Net Fcst*	Budget	2021	2022
Expenditures	7,684.2	8,733.3	9,505.7	9,692.8	10,388.6	10,897.6
Non-Tax Revenues	(573.3)	(952.6)	(817.3)	(965.9)	(980.7)	(1,007.2)
<b>Net Tax Levy</b>	<b>7,111.0</b>	<b>7,780.7</b>	<b>8,688.4</b>	<b>8,726.9</b>	<b>9,408.0</b>	<b>9,890.4</b>
% Tax Funded	93%	89%	91%	90%	91%	91%
Net Budget Change	\$	669.7	907.7	38.5	681.1	482.4
	%	9.4%	11.7%	0.4%	7.8%	5.1%
Approved Outlook	\$				9,577.0	9,957.6
Change to Approved	\$				(169.0)	(67.2)

\*Net forecast as of August 31, 2020

### Changes to the multi-year budget

The approved budget for Corporate Services has decreased by \$169,000 in 2021 and \$67,200 in 2022. The main driver for the decrease in 2021 is due to a COVID-19 related delay of the implementation of the Human Resources Information System (HRIS) and savings in 2022 from the further refinement of the HRIS licensing fees requirement. These savings are helping to offset some of the revenue losses in other departments. There were also some other minor changes as shown in the table on the following page.

### Continuing the key priorities of the multi-year budget

The 2021 to 2022 operating budget for Corporate Services focuses on modernization to meet internal and external needs and customer expectations, talent management to ensure the Corporation is able to attract and retain a skilled, high performing and diverse workforce, and the development of a risk management program to build corporate awareness, reduce liability and minimize risk. All initiatives are presented with the objective of ensuring the Town is equipped to deliver exceptional services that make people proud to call Aurora home.

## Corporate Services budget changes

	2021		2022	
	FTE	\$000's	FTE	\$000's
<b>Final 2020 Budget</b>	<b>52</b>	<b>8,726.9</b>		
2020 Post-approval adjustment	-	40.3		
<b>Starting Budget</b>	<b>52</b>	<b>8,767.2</b>	<b>56</b>	<b>9,408.0</b>
<b>Base</b>				
Salaries & Benefits including COLA, step increases and other approved staffing actions	-	200.0	-	85.5
Net Revenue Changes	-	(19.8)	-	(18.5)
Insurance Fees	-	60.8	-	66.8
Contracts (including software annual maintenance)	-	41.1	-	2.9
Courses & Seminars (including Corporate Courses)	-	0.6	-	1.1
Consulting	-	20.0	-	(10.0)
Other operating changes	-	(48.4)	-	51.0
	-	<b>254.3</b>	-	<b>178.8</b>
<b>Capital Operating Costs</b>				
HRIS Maintenance & Support	-	175.0	-	-
	-	<b>175.0</b>	-	-
<b>Maintaining Service Levels for Growth</b>				
IT Positions (2) - Strategic Plan Implementation	1	111.8	1	111.8
HR Consultant	1	108.8	-	-
Legal Assistant	1	74.2	-	-
Uplift P/T Customer Service Representative to F/T	1	55.7	-	-
Legal Articling Student	-	-	1	90.0
	<b>4</b>	<b>350.5</b>	<b>2</b>	<b>201.8</b>
<b>Enhancements and Transformation</b>				
IT Enhancements - IT Strat Plan	-	30.0	-	-
	-	<b>30.0</b>	-	-
<b>2020 Budget Approved Changes</b>				
	<b>4</b>	<b>809.8</b>	<b>2</b>	<b>380.6</b>
<b>Changes to Multi-Year Budget:</b>				
Insurance adjustor cost increase	-	10.0	-	-
Bylaw vehicle supplies	-	1.9	-	(1.1)
COVID-19 - Reduced marriage fees	-	5.0	-	(5.0)
Other adjustments	-	(0.9)	-	(7.0)
Deferral of subscription fees for HRIS project delay	-	(115.0)	-	115.0
IT licensing fees adjusted for final HRIS agreement	-	(60.0)	-	-
Adjustment to telephone service agreement	-	(10.0)	-	-
	-	<b>(169.0)</b>	-	<b>101.9</b>
<b>Revised Budget Change</b>	<b>4</b>	<b>640.8</b>	<b>2</b>	<b>482.5</b>
<b>Approved Net Budget</b>	<b>56</b>	<b>9,408.0</b>	<b>58</b>	<b>9,890.5</b>
<b>2020 Approved Budget</b>	<b>56</b>	<b>9,577.0</b>	<b>58</b>	<b>9,957.6</b>

## Modernizing the Corporation will meet internal and external needs and customer expectations

To be an efficient Municipality it is critical to have effective, integrated technology underpinning and powering the organization. Customer and staff expectations are influenced by their experience with technology. In order to provide high quality customer service, operational efficiency and maximum productivity technology must be leveraged to modernize business solutions, create efficiencies through digitalization, improve service delivery and create optimization through the collection and analysis of data. Implementation of the Technology Strategic plan is critical for modernization of all services.

## Talent management ensures that the Corporation is able to attract and retain a skilled, high performing and diverse workforce

Human capital is one of the Corporation's largest assets. A positive employee experience directly impacts and results in a positive customer experience, improved productivity and continuous improvement and organizational excellence. There are a number of initiatives that support an engaged workforce including conducting an employee engagement survey followed by action planning that will involve staff at all levels, development of a training and development program, and further enhancement of the Town's Health, Safety and Wellness Program. The Excellence Canada journey for Gold will require a robust talent management strategy as the people driver is focused on the employee experience.

## A Corporate Risk Management Program will build corporate awareness and a resilient organization

A Corporate Risk Management program is necessary to reduce liability and minimize risk. Building corporate awareness and consistency is key for success as everyone in the organization is a risk manager. Other initiatives that mitigate corporate risk include the creation and maturity of the Project Management Office, Occupational Health and Safety, and cybersecurity.

## 2021 capital budget

### Overview

The Corporate Services department plans to spend \$1.5 million in 2021 on capital projects and \$6.3 million in Capital Budget Authority. This includes \$4.2 million for repair and replacement projects, \$1.6 million for growth and new projects and \$0.6 million studies and other.

### 2021 capital budget authority

(\$000s)	Previously Approved Budget	2021 Budget		Capital Budget Authority Cash Flow			
		Capital Budget Authority*	Budget Change	Actuals to Dec/19	2020 Forecast	2021	2022+
Repair & Replacement	3,235.0	4,150.9	915.9	1,865.8	1,143.9	744.8	396.5
Growth & New	1,390.9	1,565.9	175.0	673.2	361.7	531.0	-
Studies & Other	535.0	555.0	20.0	101.1	194.9	253.0	6.0
<b>Approved Budget</b>	<b>5,160.9</b>	<b>6,271.7</b>	<b>1,110.8</b>	<b>2,640.0</b>	<b>1,700.5</b>	<b>1,528.8</b>	<b>402.5</b>
<b>Conditionally Approved Project - Requires a report back to Council before proceeding</b>							
14047 - Computer & Related Infrastructure Renewal							

\* Includes all active project budgets, adjustments to project budgets and new budget commitments

### The 10-year capital plan

The 10-year capital plan includes \$6.3 million in capital projects. The 10-year plan will invest \$3.0 million in Repair & Replacement capital which supports good asset management. This represents 48% of the 10-year plan.

### Key capital initiatives in 2021

The capital plan for Corporate Services supports modernization and the customer experience. The 2021 budget includes the following key projects all to support these initiatives:

#### Continued implementation of the Corporate IT Strategic Plan

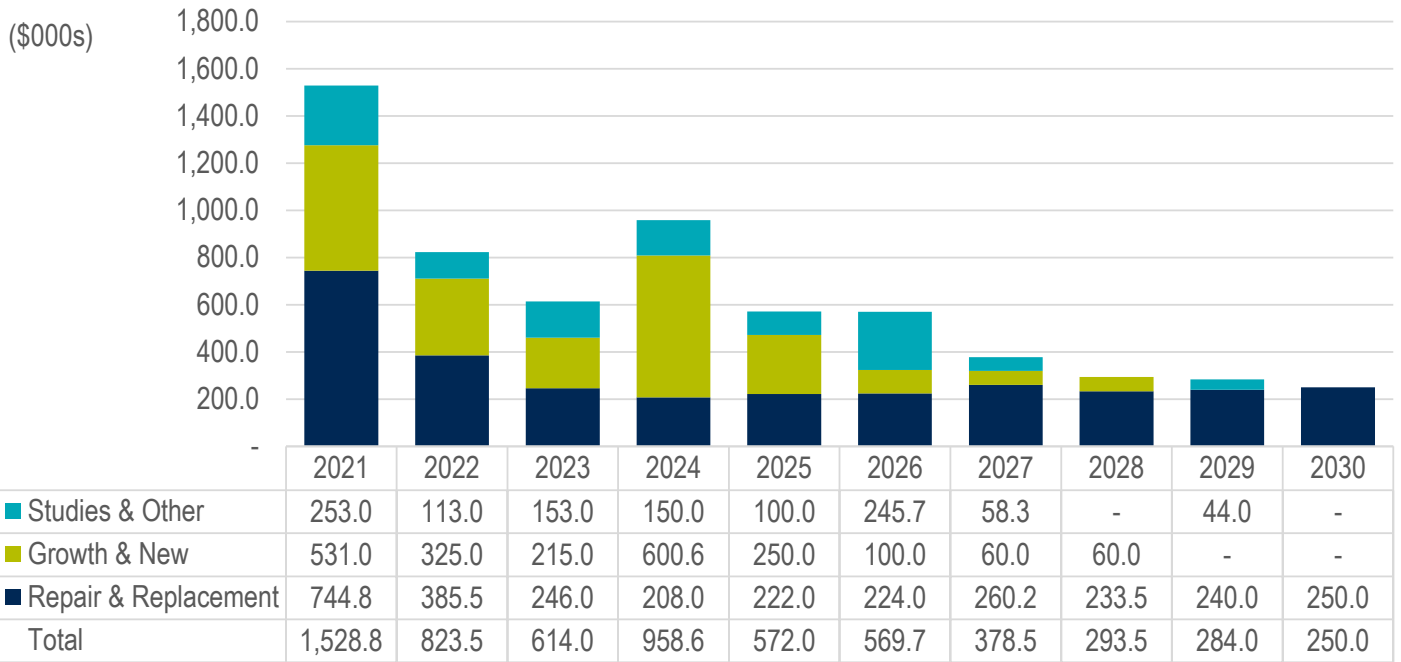
Projects identified for 2021 are focused on ensuring our technology infrastructure meets our current IT needs as some of the infrastructure is outdated and end of life. Other IT projects identified will provide the Town with tools necessary to be an effective and efficient municipality powered by technology as well as providing data that will drive business intelligence. Digitization is essential to ensure we are delivering exceptional services to our residents.

#### Diversity and Inclusion Strategy

Corporate Services plans to retain a consultant to assist with the development of a Diversity and Inclusion strategy with the objective to foster a greater sense of belonging within our workplace and our community.



## 10-year capital plan



A detailed listing of the capital projects included in the plan can be found in Tab 18 - Repair & Replacement Capital, Tab - 19 Growth & New Capital and Tab 20 - Studies & Other Capital.

## Corporate Services initiatives

### Customer

- Customer Experience Plan implementation
- Electoral System Review
- Development of Corporate wide Risk Management Program

### Modernization

- Implementation of the Technology Strategic Plan
- Review and update of Bylaws including Licensing, Noise, Property Standards, and Clean Communities
- Development of a Corporate Innovation platform

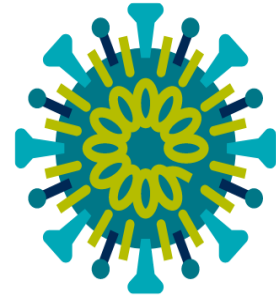
### People

- Implementation of Human Resources Information System (HRIS)
- Employee Engagement Survey and Action Plan
- Development of a Human Resources Plan
- Creation of a standard Change Management approach for project management
- Development of a Diversity and Inclusion Strategy
- Continue planning for the Excellence Canada Go for Gold certification with a goal of submitting in December of 2022



**3,014**

Animal Services requests from January 2020 to August 2020.



**296**

By-Law service requests related to COVID-19 from March 2020 to August 2020

# Corporate Services SNAPSHOT



**5,200**  
IT help desk requests anticipated for 2020



**1014**  
devices supported

**173**

Recruitment requests to date in 2020

ACCESS AURORA

## Customer Service

**4,747**

Total number of resident service tickets (January to end of September 2020)



**270**

Burial Permits Issued (January to end of September 2020)





(4 positions IT Strategic Plan Implementation)  
Corporate Services

Space Needs Confirmed

**Growth**

Yes
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**Recommendation**

Approve the positions as outlined in the IT Strategic Plan Report by Perry Group Consultants.

**Rationale/Benefits**

As part of the Technology Strategic Plan update the consultants have identified staffing concerns related to gaps in capacity and capability pertaining to leadership, enterprise corporate applications, business solutions and projects. In order to advance the implementation of the Technology Strategic Plan additional resources are required. A total request for 4 positions over the next three years fills the critical resource gaps and prepares the Technology Division to successfully implement the consultant recommended multi-year workplan and will provide needed resources to lead the organization through digital transformational change including enhanced mobility and business modernization, becoming a data driven organization, and providing enhanced digital customer services. The nature of the recommended positions are identified in the paragraphs below.

The Technology Strategic Plan identified significant resource gaps in the Solution specialists/Analyst domain. The Town has a number of large projects ahead, many of which are in the business solutions area. Each of these projects require leadership and Solution/Business Analyst resources to support systems configuration during the project, and for support after solution implementation. As a result, the addition of 4 positions focused in this area staged over the next three years, has been recommended. This will allow the Town to manage business solutions effectively and provide support for advancing the modernization and digitization of key Town processes.

Many of the Town's current and future projects, as identified in the Technology Strategic Plan workplan, involve a significant IT component. To help ensure the success of the projects, it is important to have the necessary resources in place to plan and deliver the projects effectively. A hands on leadership position is recommended in Projects to provide the division with the needed leadership to plan, direct, and effectively manage all Business related IT projects and IT driven projects. This position would be responsible to use the standard corporate project management techniques and processes for all IT related projects. As well for the detailed planning, project definition, risk assessment, milestone monitoring, financial tracking, reporting, and most importantly, the effective use of resources to deliver projects on time and on budget. In addition to the project focused tasks, this position also works collaboratively with other project resources within the corporation, to ensure the Town of Aurora project management processes are continually improving.

**Alignment with Council Priorities**

This position would support the Town's Modernization Strategic Priority being to "Develop and enhance processes, leverage technology and engage people to align the work place for success" by using technology in smarter ways, ensuring business processes support financial accountability, commitment to the digital office and workplace automation and providing easy to use, collaborative tools for information sharing.

**Impact of Not Proceeding**

IT Services needs to revitalize the IT delivery model to be better prepared for upcoming projects and changes and to help the organization move towards modernization and transformational change. A part of the revitalization include adding needed resources to help achieve the mandate and service standards that a modernized, well managed workplace requires. Proceeding at a later time will delay the needed workplan initiatives itemized in the IT Strategic Plan.

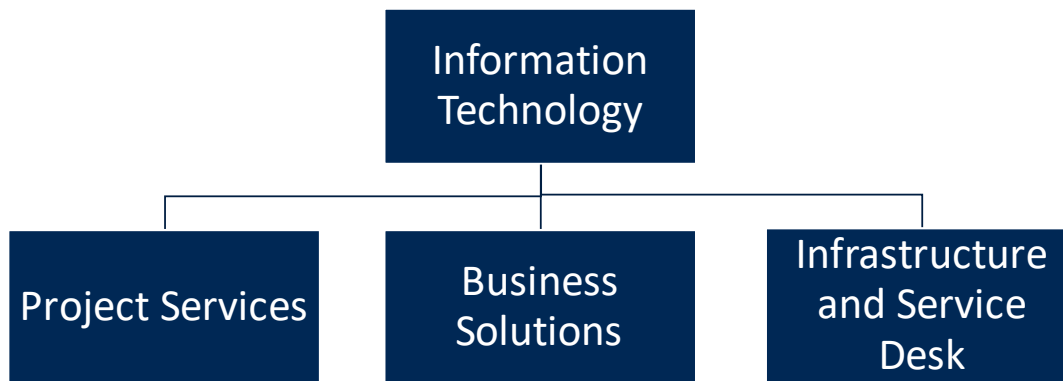
**Incremental Operating Budget Impact**

	2020	2021	2022
Staffing - # of FTEs	2.0	1.0	1.0
<b>Gross Expenditures (\$000s):</b>			
Wages and Benefits	252.0	111.8	111.8
Staffing Costs*	8.0	4.0	4.0
Offsetting Savings/Efficiencies	-	-	-
Other - Memberships	-	-	-
<b>Total Gross Expenditures</b>	<b>260.0</b>	<b>115.8</b>	<b>115.8</b>
<b>Non-Tax Revenues (\$000s):</b>			
User Fee/Other Revenues	-	-	-
Water Rate/Building Recovery	-	-	-
Other	-	-	-
<b>Total Revenue</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Net Tax Impact</b>	<b>260.0</b>	<b>115.8</b>	<b>115.8</b>

\*Includes training, memberships, computer, space accommodation & other equipment

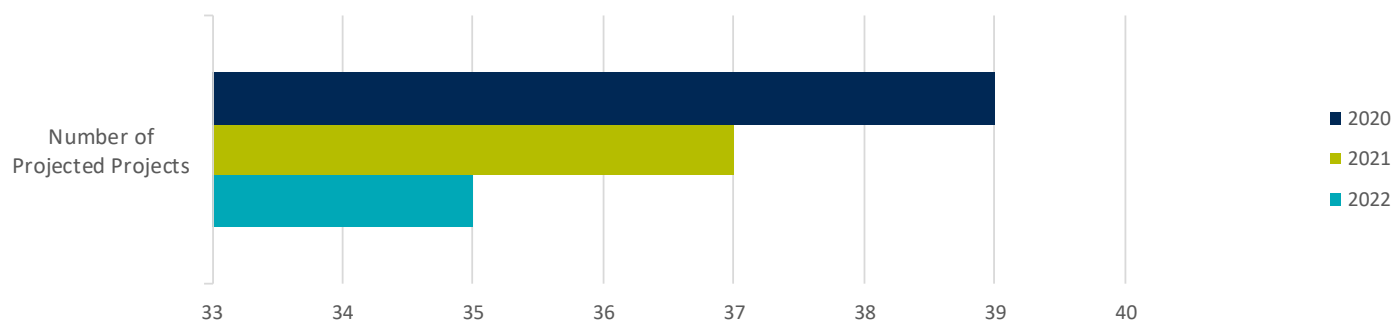
Comparative Analysis / Performance Measure

IT will be repositioned to be a strategic partner



IT Service delivery improvement involves reorganization of the technology team into 3 core areas supporting and partnering with the business units within the Town. This new structure immediately establishes a strong business solutions team which has been identified as an area needed to improve for the success of burgeoning project demands that relate to system integrations as well as support for advancing the modernization and digitization of key Town processes. This will allow the Town to manage business solutions effectively and provide support for new features, reporting and other capabilities while working closely with the business units and the other IT functional teams as partners on achieving project goals. It is critical that the Town build effective product and project teams that combine business subject matter experts, project management, business analysis and technical expertise, alongside frontline users of systems to support the execution of projects and product enhancements.

The number of technology projects identified in the Technology Strategic Plan Workplan



The Technology Strategic Plan Workplan identifies 115 projects/initiatives including major technology projects from Infrastructure, Business Solutions, Integration and Data and Customer Facing layers of the Municipal Technology Architecture to be completed over the next 3 years. The consultants have recommended additional resources be added to ensure we have adequate leadership, skills, and capacity to complete the workplan as identified and move our organization towards modernization and transformational change.



Access Aurora - Customer Service CSR Uplift P/time to F/time

Corporate Services

Space Needs Confirmed

Yes

**Recommendation**

Uplift and existing permanent part/time position to a permanent full/time position to supplement existing front line CSR team complement, raising it from 5 to 6

**Rationale/Benefits**

For the past 2 years the Access Aurora team has stretched the current staff complement (5FTE) and added services such as 2nd location at JOC, extended hours on Tuesday nights until 8:30pm, conducted annual Access Aurora Town Hall "Pop Up" events (approx. 15+ per year). We have also assisted other departments with delegated additional tasks that have been downloaded to this unit, in addition to assisting departments with special projects or tasks on an ad hoc basis. Access Aurora is also the 1st point of contact for our growing number of residents (59K) and first point of contact for all tax/water inquiries on behalf of finance. (Projected to have over 37,000 account holders in tax/water for 2019, due to increase in population, occupancy of 2C lands)

In order to maintain the current level of service that is being provided at both locations, the uplift is desired so that we can continue to offer the services that our internal/external customers have become accustomed to from the centralized hub. The uplift will add stability to the unit and will remove the need for 12 hour shifts on Tuesdays, reduce banked lieu time and/or overtime or reduce the need to use temp agency staff to piece support together for unexpected absences, vacations or illnesses. Customer service is crucial to the day to day operations of the entire corporation.

Key points which justify the need and benefit to making the investment in the initiative:

- Maintains level of streamlined services at both locations (Town Hall and JOC) and provide the ability to improve
- Helps to maintain enhanced current services such as commissioning of documents, licensing and civil ceremonies (Generating additional revenue)
- Uplift will allow us to delegate an additional division registrar among the staff complement with the province to conduct provincial activities such as Alcohol and Gaming Commission of Ontario applications for lottery/gaming, alcohol permit applications, marriage license and burial permits – generating additional revenue)
- Uplift Additional CSR staff will better support CRM optimization, corporate wide support to divisions using CRM tool
- The uplift will still need to maintain some part-time budget for summer student funds and on-call casual CSR hours

**Alignment with Council Priorities**

This request is in alignment with the Corporate and Council priority to deliver exceptional customer service consistently. This request also supports other Council Priorities in a supportive role. (Assisting all departments on day to day activity, supporting corporation at large).

**Incremental Operating Budget Impact**

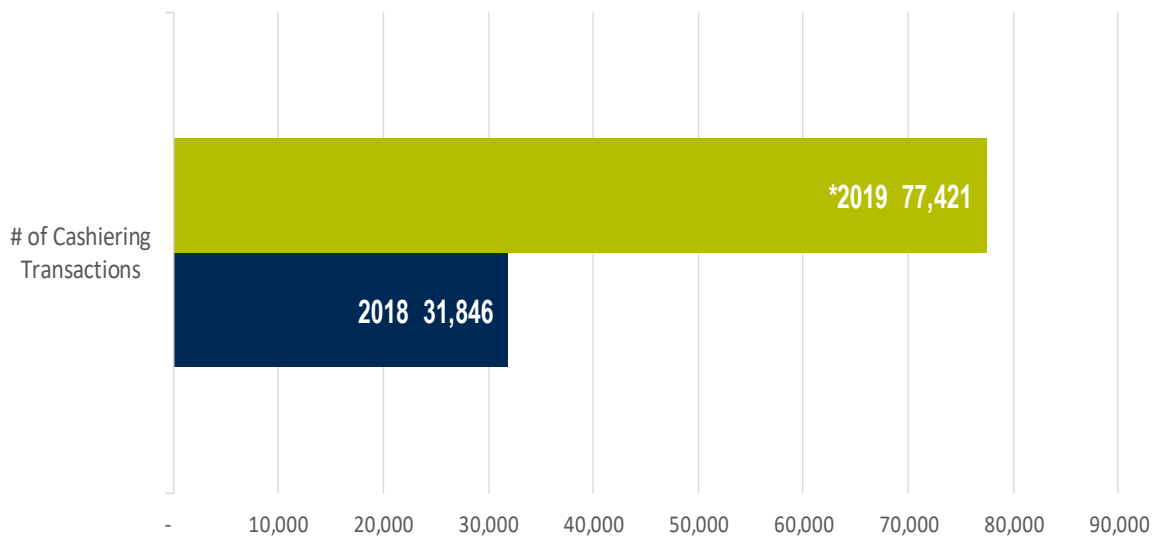
	2020	2021	2022
Staffing - # of FTEs	-	1.0	-
<b>Gross Expenditures (\$000s):</b>			
Wages and Benefits	-	55.7	-
Staffing Costs*	-	-	-
Offsetting Savings/Efficiencies	-	-	-
Other - Memberships	-	-	-
<b>Total Gross Expenditures</b>	-	55.7	-
<b>Non-Tax Revenues (\$000s):</b>			
User Fee/Other Revenues	-	-	-
Water Rate/Building Recovery	-	-	-
Other	-	-	-
<b>Total Revenue</b>	-	-	-
<b>Net Tax Impact</b>	-	55.7	-
*Includes training, memberships, computer, space accommodation & other equipment			

**Impact of Not Proceeding**

If the uplift is denied - the unit will be at risk to maintain service levels and will find it difficult to take on any additional tasks for divisions. With growth and Town activity and various projects this increases interactions with residents/visitors. The more activity the Town is engaged in, increases triage for inquiries / phone / emails, etc. The unit is at risk of failing, burn out and reducing current service levels if the uplift is not granted. Longer call wait times, line ups and moving to appointment based services versus offering walk in services would occur.

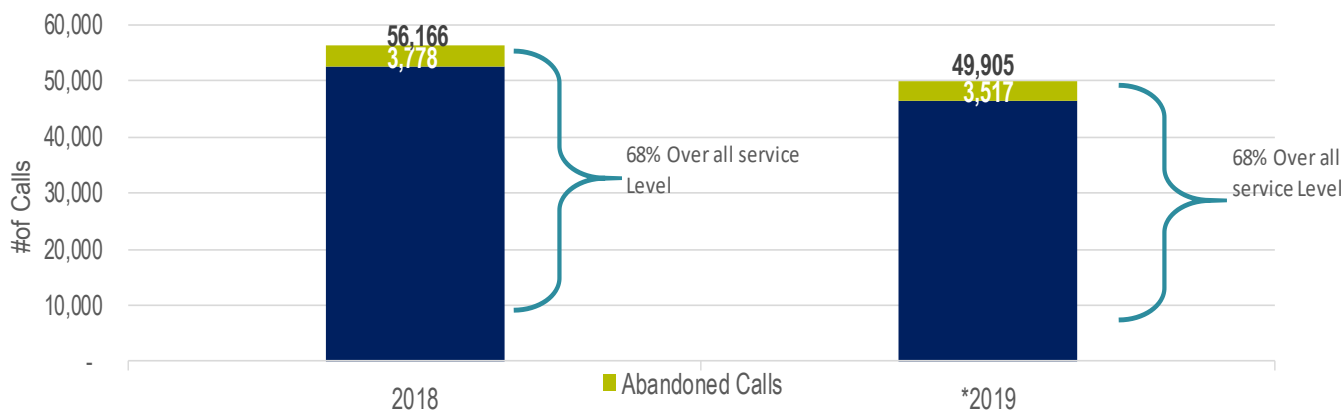
Comparative Analysis / Performance Measure

Number of Annual Cashiering Transactions



\*2019 includes data up to September 30th, 2019

Annual Number of Calls with Number of Abandoned Calls and Overall Telephony Service Level



\*2019 includes data up to September 30th, 2019

Access Aurora continues to see an increase in growth and phone call activity to the centralized hub of Access Aurora. Calls abandoned, are callers dropping the call when the CSR team cannot reach the caller waiting in the call centre queue in an efficient time. By our 3rd quarter over 3500 callers had abandoned their calls due to waiting for a CSR to answer in less than 90 seconds



**Recommendation**

Request that an additional staffing complement be approved to maintain existing service levels within Human Resources

**Rationale/Benefits**

The Human Resources Division is the organization's strategic partner with department heads, managers and their teams and with individual employees to provide strategic, customer oriented human resources initiatives, programs and services to drive a high-performing workforce to support the corporation's mission, vision and strategic goals in the most innovative, efficient and effective manner. The Town's current annual Human Resource cost is 31 million. Every employee (human resource) that is hired, is an investment and must be "managed" effectively throughout the employment cycle to ensure the best return on investment. The core services and competencies of the Human Resources Division include strategic planning (for HR alignment), legislative compliance, policy development, recruitment, onboarding, compensation and benefits, staff planning, employee and labour relations, organizational learning and development, performance management, health and safety, disability management, recognition, succession planning, and workplace wellness and engagement. The HR Consultant plays a factor in executing all these elements at the departmental level within the business units. The HR Consultant is the employee facing expert that handles all employee issues from onboarding to off boarding, essentially the entire employee lifecycle.

Human Resources has expanded our service model delivery without an increase to the HR consultant headcount compliment since 2010 (which provided a .5 fte part time uplift). Prior to 2010 we had a total workforce of 348 staff, and in 2018 we reached a workforce of 550 staff.

This position is instrumental in the support of achieving and maintaining an existing defined service standard for the Town.

With the additional pressure of 200 additional staff to our workforce without HR staff increase, the increase in transactional volume adds tremendous stress and OT time requests on current staff to meet business requirements. Municipal best practice promotes additional HR headcount for every additional 50 new staff.

**Alignment with Council Priorities**

This position supports all elements of the "people" objective in the Strategic Outcomes. This position will be key to achieving the deliverables outlined.

**Impact of Not Proceeding**

Impact of Not Proceeding would result in increased over time costs (HR staff consistently exceed their lieu allowance of 70 hours per year) and staff burnout is a real concern with regards to their personal wellness. Delayed service delivery regarding time to fill - recruitment, project delivery delays, reduced ability to meet business requirements regarding training and succession planning, performance management lapses and associated litigation risks, decreased HR presence in the workplace impacting morale and labour relations. Lack of resourcing will also decrease internal service levels and meeting corporate objectives.

**Incremental Operating Budget Impact**

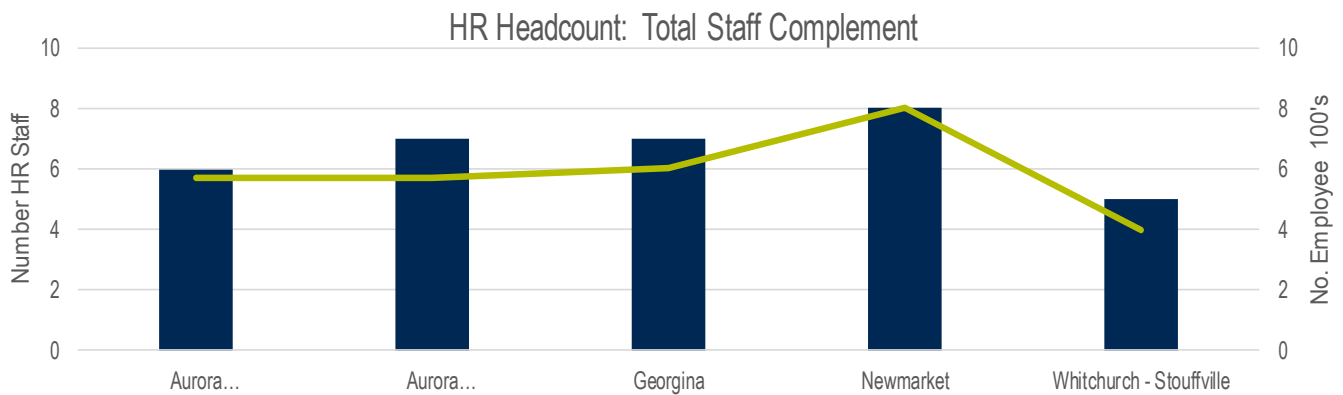
	2020	2021	2022
Staffing - # of FTEs	-	1.0	-
<b>Gross Expenditures (\$000s):</b>			
Wages and Benefits	-	107.8	-
Staffing Costs*	-	1.0	-
Offsetting Savings/Efficiencies	-	-	-
Other - Memberships	-	-	-
<b>Total Gross Expenditures</b>	-	108.8	-
<b>Non-Tax Revenues (\$000s):</b>			
User Fee/Other Revenues	-	-	-
Water Rate/Building Recovery	-	-	-
Other	-	-	-
<b>Total Revenue</b>	-	-	-
<b>Net Tax Impact</b>	-	108.8	-

\*Includes training, memberships, computer, space accommodation & other equipment



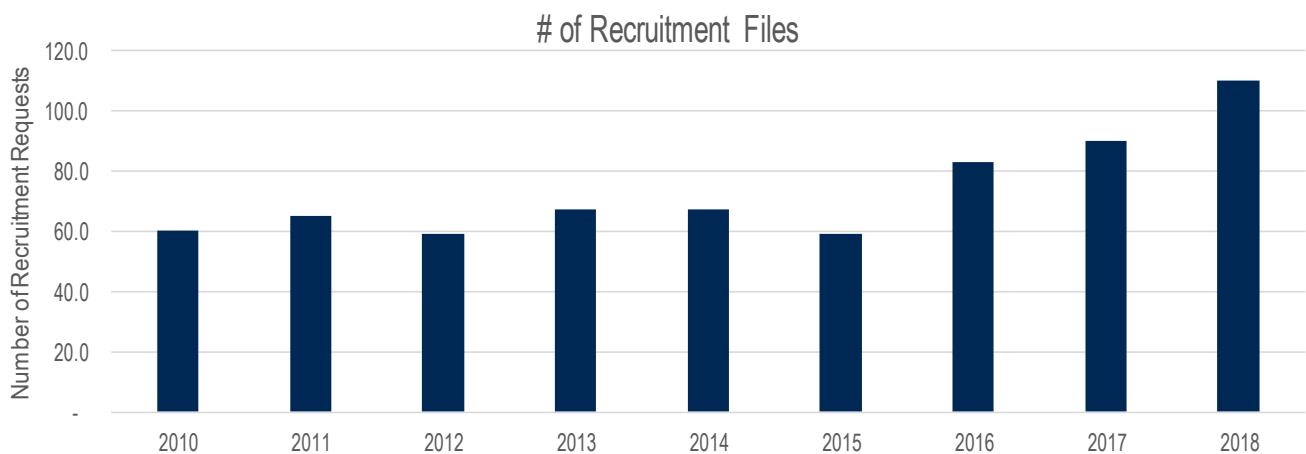
Comparative Analysis / Performance Measure

HR Staff by Municipality- The chart demonstrates HR headcount comparison to other local municipalities.



The graph above demonstrates the HR support staff for Aurora (included proposed state) compared to similar work forces in our geographical area. Our request would bring us in line with Georgina, whose staffing compliment is closest to that of Aurora. Newmarket is slightly larger, WS slightly smaller. All 3 municipalities above have also requested additional HR support so the numbers will continue to increase.

HR Recruitment Requests - This chart demonstrates the increase in recruitment pressures.



This graph demonstrates one element of the HR Consultant position which is recruitment management. This has steadily increased over the years, and this trend will continue with an increase in local competition for specialized roles and projected retirements. Recruitment easily accounts for 60% of the HR Consultants day, leaving minimal time for coaching, performance management, proactive Employee Relations risk mitigation, and workplace investigations.



Legal Assistant  
Corporate Services

Space Needs Confirmed

Yes

Growth

**Recommendation**

Hire a legal assistant to assist the Legal Services Division.

**Rationale/Benefits**

Currently, the duties of a legal assistant are performed by the Claims and Legal Coordinator position who also assists with claims. The amount of claims and litigation (both insured and uninsured) are increasing every year. The insurance industry has predicted that the rise in claims will continue over the next several years.

Legal Services handles all claims that are within the insurance deductible in-house. At this time, the insurance deductible is \$10,000. It is anticipated that the Town will be facing a substantial rise in insurance premiums due to the significant increase in complex claims, population growth and a hardening insurance market. It is anticipated that the Town will be required to increase its insurance deductible in 2020 to either \$25,000 or \$50,000 to achieve cost savings on rising insurance premiums. As a result, the amount of claims that will be handled fully in-house will continue to increase and work that was previously completed by the insurer or lawyers hired by the insurer, will need to be completed in-house. There is no capacity in Legal Services to assume this additional work.

Further, the Legal Services Division is intending to revise the Town's risk management policy and implement a risk management plan which will include substantial review and revision of policies, processes and procedures. This work will primarily be completed by the Town's Paralegal which will result in the Town's claims being downloaded to the Claims and Legal Coordinator who is already working at full capacity in the current role. It is becoming increasingly difficult for the Claims and Legal Coordinator position to assist with both insurance related matters and provide an administrative function to the division. A legal assistant is required to assist with the efficient operation of the Legal Services Division, which will result in the delivery of legal services to Council and to the client departments in an effective and timely manner.

**Alignment with Council Priorities**

Hiring this position will provide appropriate level of resources to support service delivery.

**Incremental Operating Budget Impact**

	2020	2021	2022
Staffing - # of FTEs	-	1.0	-
<b>Gross Expenditures (\$000s):</b>			
Wages and Benefits	-	71.3	-
Staffing Costs*	-	3.0	-
Offsetting Savings/Efficiencies	-	-	-
Other - Memberships	-	-	-
<b>Total Gross Expenditures</b>	<b>-</b>	<b>74.3</b>	<b>-</b>
<b>Non-Tax Revenues (\$000s):</b>			
User Fee/Other Revenues	-	-	-
Water Rate/Building Recovery	-	-	-
Other	-	-	-
<b>Total Revenue</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Net Tax Impact</b>	<b>-</b>	<b>74.3</b>	<b>-</b>

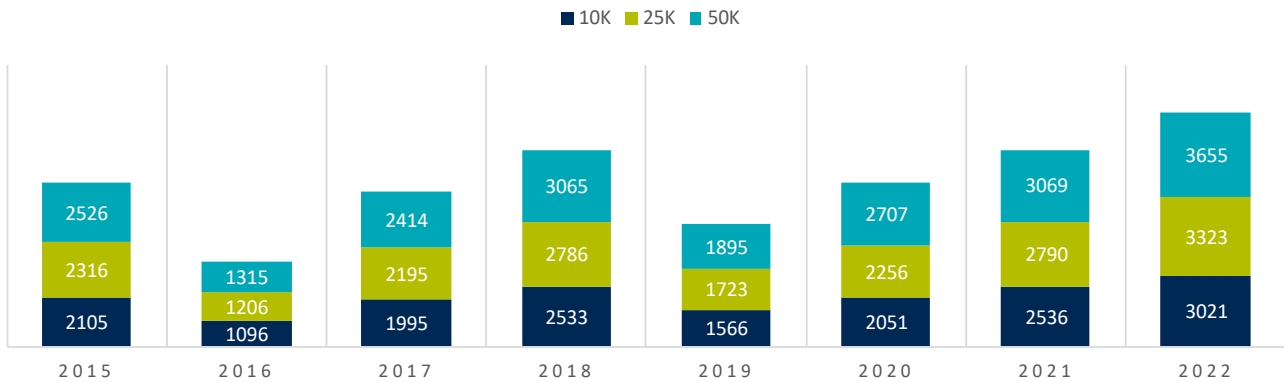
**Impact of Not Proceeding**

If this position is not approved, the Claims and Legal Coordinator position will continue to do both roles. The delivery of legal services may be delayed, deadlines may be missed, including court deadlines, decrease in service levels to the corporation, claims may not be handled in a timely manner, delay in implementing the risk management policy and plan and therefore, corporate liability, invoices may not be paid in a timely manner.

\*Includes training, memberships, computer, space accommodation & other equipment

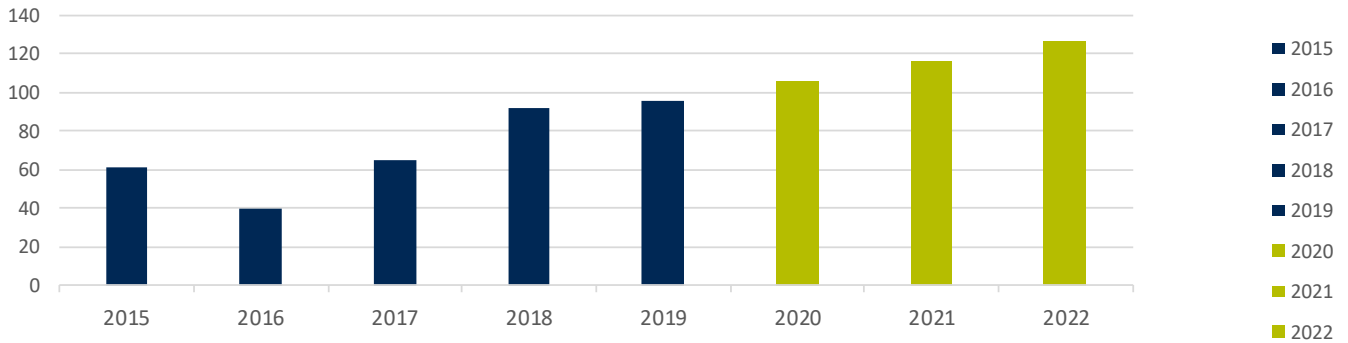
Comparative Analysis / Performance Measure

Staff Time (in hours) to handle claims will increase if the insurance deductible increases



Although Town staff handled more claims in 2019, than in 2018, many of the claims in 2018 were more complex (i.e litigation claims) and required additional staff time. It is projected that the Town will receive 10 additional claims each year over the current year. An average litigation claim takes approximately 100 hours of staff time to complete, while an average property damage claim takes 15-20 hours. An increase in the insurance deductible over the existing \$10,000 will result in more claims being handled in-house requiring additional staff time.

Number of insured and uninsured claims managed by Legal Services continue to grow in number and complexity



In addition to new claims, approximately 20% of the claims in each year remain open for a number of years and continue to be dealt with in-house by staff.



No

**Recommendation**

Hire an articling candidate to assist the Legal Services Division.

**Rationale/Benefits**

The workload of the Legal Services division continues to rise every year as a result of increases in issues requiring agreements or legal opinions, more planning applications that are being appealed and more claims and litigation. In addition, legislation impacting municipalities continue to either be introduced (ex. cannabis legalization) or revised (ex. role of the OMB/LPAT) and there is an expectation that this will continue in the future. Instead of hiring another lawyer, it is recommended that Legal Services hire an articling candidate to assist with the workload. In addition, the articling candidate would work on projects, such as updating outdated policies and modernizing processes, which will include updating existing template agreements and creating new ones that are needed to keep pace with legislative changes. Articling candidates have completed law school and are required to work for a year prior to obtaining their license to practise law. Articling candidates have most of the same responsibilities of a lawyer; however, they must be supervised by a lawyer. Hiring an articling candidate would be beneficial for the Town (financially, it is more effective to hire an articling candidate than to retain an external lawyer or hire another lawyer) and beneficial for the articling candidate (he/she will gain the skills and experience they require to enter the legal profession).

**Alignment with Council Priorities**

This initiative supports providing appropriate level of resources to support service delivery.

**Incremental Operating Budget Impact**

	2020	2021	2022
Staffing - # of FTEs	-	-	1.0
<b>Gross Expenditures (\$000s):</b>			
Wages and Benefits	-	-	85.0
Staffing Costs*	-	-	5.0
Offsetting Savings/Efficiencies	-	-	-
Other - Memberships	-	-	-
<b>Total Gross Expenditures</b>	<b>-</b>	<b>-</b>	<b>90.0</b>
<b>Non-Tax Revenues (\$000s):</b>			
User Fee/Other Revenues	-	-	-
Water Rate/Building Recovery	-	-	-
Other	-	-	-
<b>Total Revenue</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Net Tax Impact</b>	<b>-</b>	<b>-</b>	<b>90.0</b>

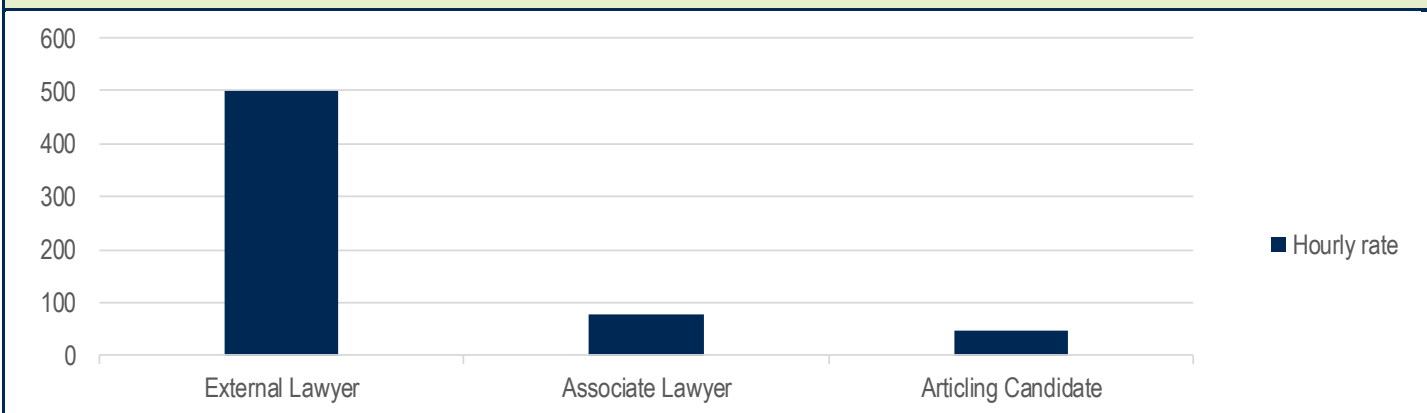
**Impact of Not Proceeding**

If this position is not approved, the delivery of legal services may be delayed, deadlines may be missed, agreements may not be entered into in a timely manner, projects may not be completed, additional lieu time/overtime may be incurred.

\*Includes training, memberships, computer, space accommodation & other equipment

**Comparative Analysis / Performance Measure**

**Hourly rate comparison between external lawyer (average), internal lawyer and proposed articling student**



Legal Services handles most legal matters in-house. Files that are beyond the expertise of staff or are of a controversial nature are outsourced to external lawyers. Recent legislative changes, such as OMB reform, cannabis legalization the modernization of the Construction Act have increased the legal opinions requested of Legal Services staff. In addition, there has been an increase in the review of legal documents and agreements in procurement matters and other matters as more parties are ensuring that any agreements made between the parties are in writing and legally binding. Lastly, there was been a spike in planning appeals as a result of developers wanting to ensure that their applications fall under the previous legislation and as a result of the passing of the Town’s comprehensive zoning by-law. It has become increasingly difficult for Legal Services staff to provide legal advice and services within a timely manner. An articling candidate would be able to handle the routine files and agreements, which is more cost effective than outsourcing these routine matters to an external lawyer.

**Articling is the final step before becoming a licenced lawyer**



In order to work as a lawyer in Ontario, a person needs to be licensed with the Law Society of Ontario. The licensing process requires a candidate that has finished law school to, among other things, obtain experience working in a legal environment by completing a 10-month placement. The articling candidate is supervised by a licensed lawyer and will assist Legal Services in all aspects of legal work, including conducting legal research, providing opinions, drafting letters and memorandums, reviewing and preparing simple or routine agreements, drafting Council reports and bylaws, and attending meetings.

**Intentional Blank**