Final Report

Town of Aurora
Service Delivery Review

October 2021
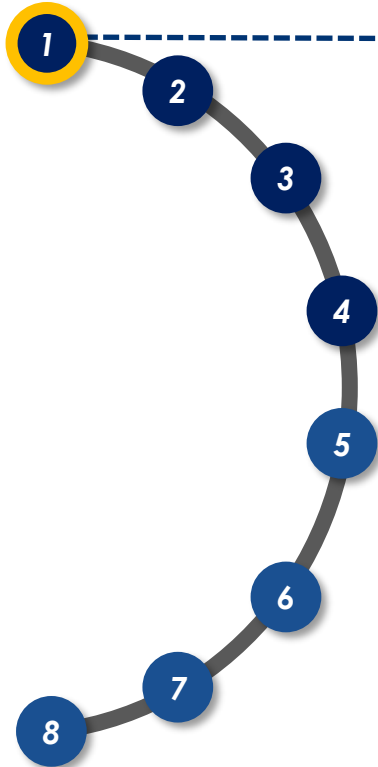
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1. Executive Summary

"I've only been a resident since 2019 and have not regretted my decision to move here from Oakville for one second. This is one of the nicest and most caring places I have ever encountered." – Aurora Resident

a.   Project Overview

b.   Summary of Key Findings

c.   Overview of Current Service Performance and Projected Service Demands

d.   Overview of Improvement Opportunities

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a. Project Overview

The Town of Aurora engaged StrategyCorp to conduct a Service Delivery Review ("SDR" or "Engagement"). This project is focused on improving services that residents use in their day-to-day lives while also driving ongoing efficiencies, innovation, and cost savings in delivering those services.

OBJECTIVES

Members of the Council and the Town's senior leadership team defined the objectives of a successful review as:

- Providing clarity on the services that Aurora provides and articulating their value;
- Validating that Aurora is providing the right services and whether it should provide new ones;
- Identifying where service levels and KPIs need to be set and documented and how they currently compare to peers;
- Gaining the resident perspective on the services provided;
- Informing further discussions on organizational capacity and how departments should collaborate to achieve service levels;
- Understanding how growth and COVID-19 will impact service levels and future resource needs; and
- Informing disaster recovery and business continuity planning.

METHODOLOGY

In conducting this SDR, StrategyCorp undertook an approach comprised of three main phases, each one building off the former.

1. **Research and Current State Assessment:** Identified current strengths, gaps, and opportunity areas as relating to the Town's services. This leveraged primary and secondary research including document review, stakeholder interviews (Councillors and key staff members), and an online resident survey. An extensive inventory of all Town services was undertaken to document service descriptions, levels, and key gaps.

2. **Growth Impact Analysis:** A set of future growth scenarios and service growth drivers were defined. Using population growth and comparator municipality benchmarking, a high-level service needs forecast and readiness assessment were developed.

3. **Opportunity Development:** 38 improvement opportunities were identified and evaluated based on work completed in Phases 1 and 2, comparator benchmarking, and leading practices.

b. Summary of Key Findings

Information gathered through existing data and documents, specific details on all core services, Council, ELT and CMT interviews, and the public engagement survey informed the following observations, which in turn, were used to develop service delivery improvement opportunities.

Key takeaways were as follows:

HEALTHY FINANCIAL POSITION
Overall, the Town is in a healthy position from a financial and organizational capacity perspective. Aurora's financial health was assessed against approximately 65 indicators, with the Town performing at or above average for nearly all indicators. Aurora's taxation levels are also on par with that of comparators.

TOWN GROWTH
The ability to service future growth emerged as a key theme. Population and development-driven services will face greater difficulty in meeting planned growth targets from York's MCR (e.g., planning and development, water and wastewater, recreation and culture services, and facilities management).

SERVICE PERFORMANCE
19/25 of Town's services are performing at/above standard. However, many service areas need to establish or update to more defined service levels. A key enabler of this will be establishing enterprise-wide service levels through development of internal service level agreements and cross-functional collaboration.

STAFF CULTURE AND DEVELOPMENT
Participants referenced a positive culture and dedicated staff teams at Aurora. There is opportunity for Aurora to invest in its workforce of the future through a long-term HR strategy that includes training, learning and development, and diversity and inclusion.

SERVICE MODERNIZATION
A significant number of continuous improvement and modernization initiatives are underway. Moving forward, it is important for Aurora to leverage change management to ensure staff at all levels can embrace the desired future state for Aurora.
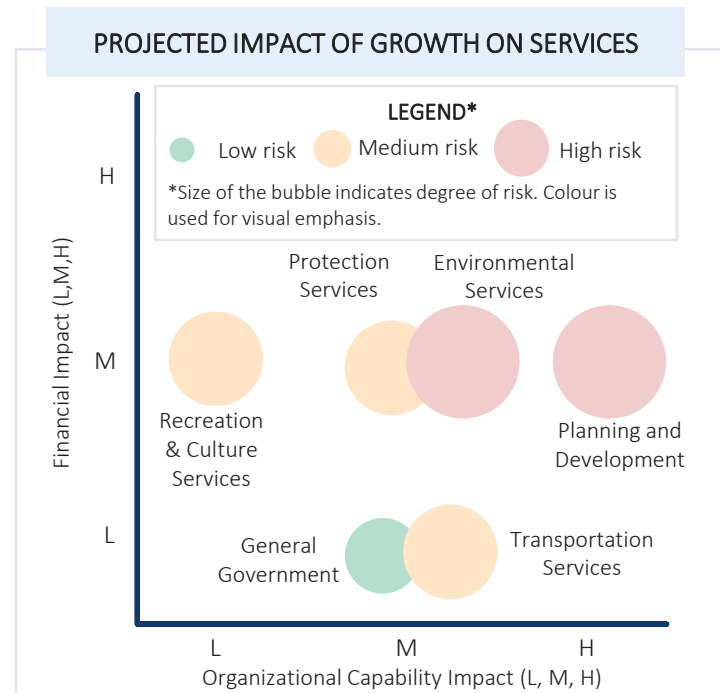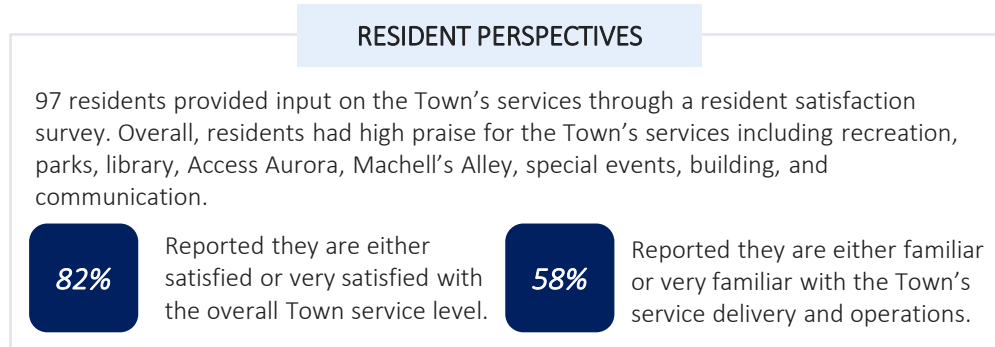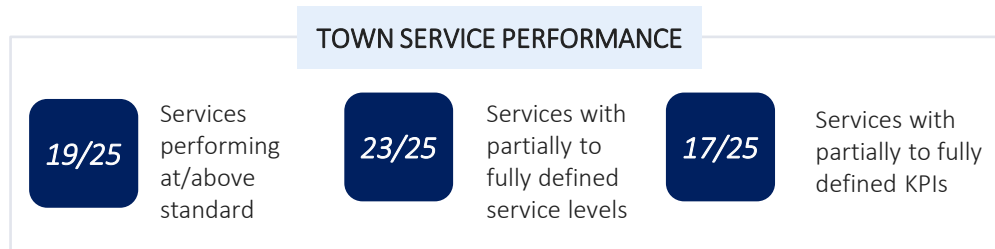
DIGITAL TRANSFORMATION
Along with HR, the future of work is also accelerating digital transformation in municipalities. As other municipalities in the region like Newmarket prioritize these innovations, Aurora has both the opportunity to participate in regional collaboration efforts and modernize its own operations.

c. Overview of Current Service Performance and Projected Service Demands

The following provides an overview of Town service level performance, as identified in the service delivery review and through resident input. Aurora anticipates that the Town's population will grow to 84,900 by 2051. The service delivery review projected the impact this growth will have on services. A summary of the growth impact analysis is also captured below.

TOWN SERVICE PERFORMANCE

19/25 — Services performing at/above standard

23/25 — Services with partially to fully defined service levels

17/25 — Services with partially to fully defined KPIs

RESIDENT PERSPECTIVES

97 residents provided input on the Town's services through a resident satisfaction survey. Overall, residents had high praise for the Town's services including recreation, parks, library, Access Aurora, Machell's Alley, special events, building, and communication.

82% — Reported they are either satisfied or very satisfied with the overall Town service level.

58% — Reported they are either familiar or very familiar with the Town's service delivery and operations.

PROJECTED IMPACT OF GROWTH ON SERVICES

LEGEND*

● Low risk   ● Medium risk   ● High risk

*Size of the bubble indicates degree of risk. Colour is used for visual emphasis.

Financial Impact (L,M,H)

H

M

L

Protection Services

Environmental Services

Recreation & Culture Services

Planning and Development

General Government

Transportation Services

L   M   H

Organizational Capability Impact (L, M, H)

d. Overview of Improvement Opportunities

Opportunities were divided into two groups. Those that were categorized as Service-Driven Opportunities have been further categorized as 'Enterprise Wide' or 'Department Specific'.

Opportunities that were categorized as Continuous Improvement Opportunities have been further categorized as 'Leading Municipal Practices' and 'Innovative Practices'.

21 Service-Driven

4 **Enterprise Wide:** Opportunities that apply across the organization and can benefit from an enterprise-wide solution.

17 **Department Specific:** Opportunities that apply to specific Town Departments and Divisions. These focus on actions and initiatives that will either improve the internal operations of the Division or how it delivers external services. In some cases, these opportunities can have inter-departmental connections.

These opportunities have been developed further into opportunity profiles, which detail the rationale for change, service impact analysis, financial implications, and implementation considerations, among other areas.

17 Continuous Improvement

7 **Leading Municipal Practice:** Opportunities that Aurora may consider as part of broader efforts to modernize and continuously improve. While not directly linked to a service, they provide the organizational infrastructure to improve service delivery.

10 **Innovative Practices:** Opportunities for innovation that, in a post-COVID-19 environment, will address changing resident needs and preferences.

These are opportunities to accommodate growth, retain changes to services and ways-of-working that have been identified as improvements, and explore digital transformation more vigorously.

It is important to note that prior to this SDR process, several planning, digitization, and improvement initiatives were already underway; in many cases, they set the foundation for opportunities identified within this review. They have been identified in detail on Slide 19.

d. Overview of Service-Driven Improvement Opportunities

ENTERPRISE-WIDE	DEPARTMENT-SPECIFIC		
1. Establish service levels where gaps exist and adopt an annual service level review process. 2. Through the customer experience plan (CEP), establish internal service level agreements (SLAs) between departments to achieve enterprise-wide service levels. 3. Through the CEP, validate whether to keep customer service for Community Services separate from Access Aurora. 4. Through the CEP, better define the Town's value proposition to residents and improve access to services.	**Office of the CAO** 5. Shift Corporate Communication's focus away from administrative tasks towards more strategic ones. **Corporate Services** 6. Ensure recognition and capacity for Access Aurora's internal customer service initiatives. 7. Deliver off-site wedding services. 8. Bring clarity and consistent implementation to the SLAs between Legal Services and other Town Divisions. 9. Define a HR strategy linked to the Town's strategic plan.	10. Elevate the role of the PMO to focus on more enterprise-wide transformation projects. 11. Given clear increases in service level expectations and overall demand for by-law services, either align resourcing to meet demand, or decrease service levels. 12. In partnership with the region, transition to an Administrative Monetary Penalty System (AMPS). **Finance** 13. Review contracted services to ensure value-for-money and opportunities to improve service level. **Community Services** 14. Better empower and train front-line staff to manage customer requests. 15. Develop a Council-approved policy for Special Events Calendar planning.	16. Review mandate and resourcing of Facilities Management to ensure alignment with Town growth and Council expectations. 17. Review mandate and resourcing of Culture to ensure implementation of master plans. **Operations** 18. Digitize Road Occupancy Permit (ROP) application and develop by-law to enforce ROPs. **Planning and Development** 19. Expand functionality and utilization of CRM system. 20. Develop a Council-driven real-estate portfolio strategy. 21. In coordination with Community Services, explore the delivery of new business and community development services.

d. Overview of Continuous Improvement Opportunities

LEADING MUNICIPAL PRACTICES	INNOVATIVE PRACTICES
1. Drive greater alignment between the corporate strategic plan and Division-level priorities. 2. Build more collaborative partnerships between cross-functional support staff and service delivery staff. 3. Create an annual governance training plan for Council. 4. Increase focus on diversity and inclusion within service delivery to better reflect the Town's changing demographics. 5. Appropriately resource enterprise-wide initiatives, while defining and communicating clear roles and responsibilities. 6. Improve the intranet and increase its use to facilitate greater information sharing across departments. 7. Formalize and sustain practices put in place during the pandemic that proved to be effective.	**Resident and Business Needs and Preferences** 1. Accessible Public Wi-Fi 2. "Open Streets" initiatives 3. Climate Adaptation Planning 4. Participatory Budgeting **Improved Services and New Ways-of-Working** 5. Accommodating Hybrid Work 6. "Third Spaces" initiatives **Digital Transformation and Investments** 7. Digital Services and Payments 8. Open Data 9. Digital Engagement 10. "Smart Cities" Investments

The report contains a deeper dive on each of the opportunity areas. Service Driven Opportunities are built out into Opportunity Profiles with financial analysis and relevant implementation considerations. Continuous Improvement Opportunities are further detailed with rationale, leading practices, benchmarking, and case studies.

e. Summary of Potential Financial Benefits and Investments (1 of 2)

The following is a summary of the potential benefits that the Town could achieve by implementing the proposed initiatives. Most of these are productivity savings, not direct savings. Additionally, they will be realized once successful implementation has occurred over the identified timeline. Time and resource investments are required to implement opportunities and achieve these benefits. The majority of cost savings were calculated using three main benchmarks related to People and Talent, Digitization, and Process Standardization. The table below summarizes savings at the opportunity level.

Opportunity	Initial Investment	Annual Operating Expenses	Total Annual Savings	Net Annual Savings
1. Missing service level development and annual update	-	$70,100	$515,000	$444,900
2. SLA development	$175,200	Included in Opp. #1	Included in Opp. #1	Included in Opp. #1
3. Customer Services/Access Aurora integration	Existing CEP	-	$45,300	$45,300
4. Value proposition communications to residents	Existing CEP	$4,700	-	($4,700)
5. Communications team transition to strategic activities	-	-	-	-
6. Access Aurora capacity	-	-	$47,500	$47,500
7. Off-site wedding services	-	$20,800	$62,700	$41,900
8. Legal Services SLA implementation	-	Included in Opp. #2	Included in Opp. #1	-
9. HR Strategy development	$17,900	$686,700	$824,000	$137,300
10. PMO role transition	$8,100	-	$8,000	$8,000
11. By-law resourcing assessment		Approved in 10 yr capital budget	-	-
12. Transition to an AMPS	$14,300	-	$11,000	$11,000

For a description of all financial assumptions, see Appendix D.

e. Summary of Potential Financial Benefits and Investments (2 of 2)

Opportunity	Initial Investment	Annual Operating Expenses	Total Annual Savings	Net Annual Savings
13. Contracted services review	-	$70,100	$217,000	$146,900
14. Recreation front-line staff training	Included in Opp. #10	Included in Opp. #10	Included in Opp. #10	Included in Opp. #10
15. Special Events Calendar Policy development	$7,100	-	$23,000	$23,000
16. Facilities Management mandate and resource review	$8,000	-	-	-
17. Culture Services mandate and resource review	-	-	-	-
18. ROP application digitization and enforcement by-law	-	-	$7,500	$7,500
19. CRM expansion	Existing Technology Strategic Plan	-	$55,000	$55,000
20. Real Estate Portfolio Strategy development	$6,200	-	$27,500	$27,500
21. Business and Community Development services	$15,200	-	-	-
Total	$252,000	$852,400	$1,843,500	$991,100

NOTES:
- *Initial Investment* are one-time up front internal or external costs (e.g., staff time, consultants, training, software, etc.) for the opportunity area.
- *Annual Operating Expenses* are annual costs that must be incurred when pursuing the opportunity.
- *Initial Investment and Annual Operating Expenses do not account for additional internal planning and coordination required to mobilize the opportunities. Aurora is encouraged to consider planning and resource timing when moving forward with these opportunities.*
- *Total Annual Savings* are cost savings that can be achieved through this opportunity area.
- *Net Annual Savings* are cost savings that will be achieved after annual operating expenses are incurred.
- *A series of* **staffing considerations** *were identified throughout the review and shared with internal leadership. Staffing decisions should be based on the positions approved in the multi-year budget.*
- *In some instances, it may be more cost-effective for the Town to outsource initiatives like municipal policy/plan development.*

f. Implementation and Next Steps

Each opportunity analysis includes implementation considerations, including recommended timing and prioritization. Further operational planning will be required to prioritize opportunities, integrate these initiatives into the Town's budgeting and workplan processes, and mitigate against possible risks to timelines including the COVID-19 pandemic and its impact on Town finances and the 2022 municipal elections.

NEXT STEPS

1. Align upon prioritization of recommended opportunities.

2. Conduct further operational planning as required by internal budgeting and work planning processes.

3. Implement opportunities in a phased approach and report to Council on progress.

Note: Each Wave is expected to span 1 to 2 years.

Wave 1

- Missing service level development and annual update*
- Access Aurora capacity
- Off-site wedding services
- By-law resourcing assessment
- Contracted services review
- Special Events Calendar Policy development
- Culture Services mandate and resource review
- ROP application digitization and enforcement by-law

*This activity will set the foundation for additional opportunity areas and is prioritized for Wave 1.

Wave 2

- SLA development
- Communications team transition to strategic activities
- Legal Services SLA implementation
- HR strategy development
- PMO role transition
- Transition to an AMPS
- Recreation front-line staff training
- Facilities Management mandate and resource review
- Contracted services review (continued)

Wave 3

- Customer Services/Access Aurora integration
- Value proposition communication to residents
- CRM expansion
- Real estate portfolio strategy development
- Business and community development services
- Contracted services review (continued)

f. Implementation and Next Steps

To inform further prioritization of projects, the following opportunities have been identified as directly supporting priorities of digital modernization, service integration, and shared services/alternative service delivery models.

SERVICE-DRIVEN OPPORTUNITIES

Digital Modernization	Service Integration	Shared Services/Alternative Service Delivery
• **Opportunity #18:** Digitize Road Occupancy Permit (ROP) application and develop by-law to enforce ROPs. • **Opportunity #19:** Expand functionality and utilization of CRM system.	• **Opportunity #3:** Through the CEP, validate whether to keep customer service for Community Services separate from Access Aurora.	• **Opportunity #12:** In partnership with the region, transition to an Administrative Monetary Penalty System (AMPS). • **Opportunity #13:** Review contracted services to ensure value-for-money and opportunities to improve service level.

Additionally, the following digital modernization initiatives are already underway. They can also be prioritized for implementation.

EXISTING OPPORTUNITIES

- Human Resource Information System (HRIS)/ADPNow
- Financial management system
- eScribe for legislative services
- ERP system to automate workflows and enable reporting functionality
- Automated water meter read system
- Software for business owners and plumbing contractors to complete backflow prevention tests
- Fleet management software pilot to help increase preventative maintenance of fleet
- Digital database for engineering drawings, enabling faster responses to information requests
- Contract management software within Legal Services

2. **Project Context and Overview**
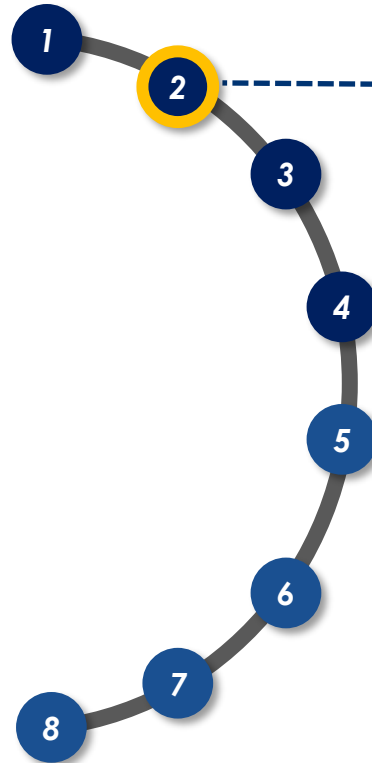
a. Context and Objectives

b. Project Approach Methodology

c. Overview of Aurora

- Aurora at a Glance

- Current Service Offering

- Change Currently Underway

a. Context and Objectives

CONTEXT

The Town of Aurora is in the process of transitioning from a "small town to a large town." This includes modernizing and maturing key Town services while maintaining Aurora's distinct identity. The Town of Aurora is a growing community seeking to preserve its heritage and small-town feel while managing population and commercial growth.

The Town of Aurora has engaged StrategyCorp to conduct a Service Delivery Review ("SDR" or "Engagement"). This project is focused on improving services that residents use in their day-to-day lives, while also driving ongoing efficiencies, innovation, and cost savings in delivering those services.

OBJECTIVES

Members of the Council and the Town's senior leadership team defined the objectives of a successful review as:

- Providing clarity on the services that Aurora provides and articulating their value;
- Validating that Aurora is providing the right services and whether it should provide new ones;
- Identifying where service levels and KPIs need to be set and documented and how they currently compare to peers;
- Gaining the resident perspective on the services provided;

- Informing further discussions on organizational capacity and how departments should collaborate to achieve service levels;
- Understanding how growth and COVID-19 will impact service levels and future resource needs; and
- Informing disaster recovery and business continuity planning.

b. Project Approach and Methodology

In conducting this SDR, StrategyCorp undertook an approach comprised of the following main phases, each one building off the former.

APRIL TO OCTOBER 2021

Research and Current State Assessment

Identified current strengths, gaps, and opportunity areas as related to the Town's services.
Sources:
- ✓ Internal data and documents.
- ✓ Council (5), ELT (7), and CMT (21) interviews.
- ✓ Corporate Service Inventory (documented service descriptions, levels, and key gaps).
- ✓ 2019 FIR data was used to ensure analytical consistency and comparability.

Growth Impact Analysis

- ✓ Reviewed Town growth planning documents.
- ✓ Engaged subject matter experts.
- ✓ Defined a set of future growth scenarios and service growth drivers.
- ✓ Developed high-level service needs forecast and a readiness assessment using population growth and comparator municipality benchmarking.

Resident Engagement

- ✓ Launched a public engagement survey to take a pulse check of the Town's experience with resident-facing services.
- ✓ Received 97 responses and good insight into the trends of resident experiences with Town services.

Opportunity Development

- ✓ 21 service-driven opportunities and 18 continuous improvement opportunities were identified based on work completed in Phases 1 and 2, comparator benchmarking, and leading practices.
- ✓ Opportunity analysis and development used most recent 2021 Town budget data to ensure accurate analysis.
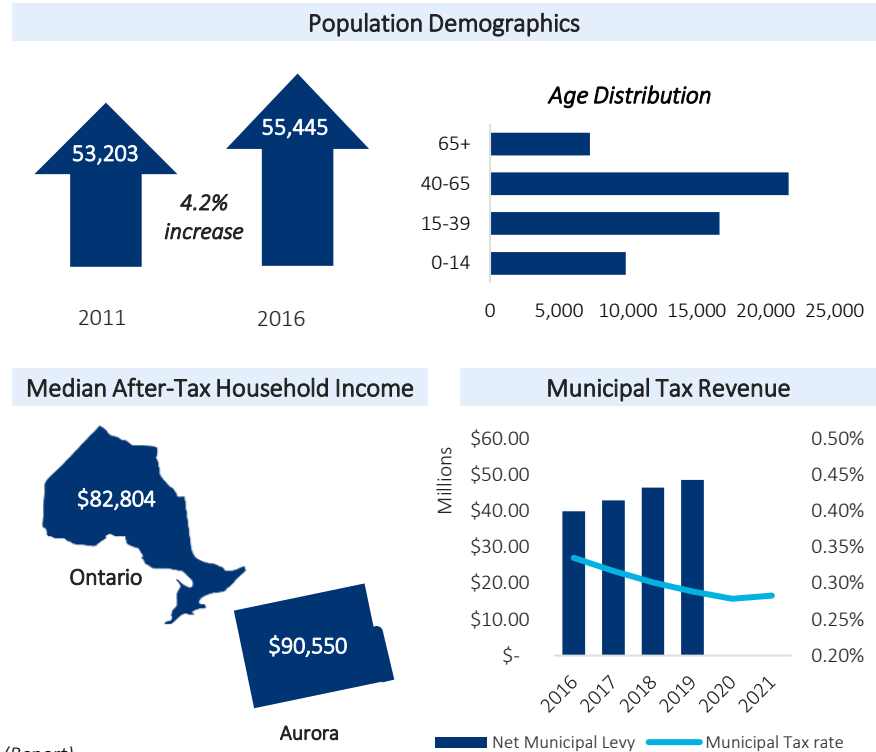
c. Overview of Aurora: Growth and Demographics

The Town of Aurora is situated in York Region with an estimated population of 62,000 residents as of 2020. It is home to over 1,300 businesses, including approximately 150 major industries and head offices.

The Town comprises nearly 50 km^2 with a population density of approximately 1,112 km^2.

Aurora has:

- Experienced a population increase of over 13% since 2016 and will see its population grow by 37% (1.2% per year) by 2051.

- A population of predominately working age residents, with an over 65 population (13%) that is lower than the provincial average (14.6%).

- An above average median household income, when compared to the rest of the province.

- Municipal tax rate decreased between 2016 – 2020, while the municipal tax levy and average Current Value Assessment (CVA) has increased over the same period. Among 35 municipalities, **Aurora had the 7th <u>lowest</u> tax rate across all of Ontario**.*

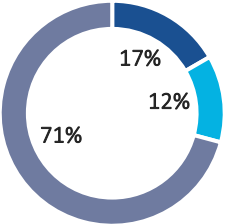* Source: Jannine Rane, ZOOCASA (2020). *Ontario Cities With the Highest and Lowest Property Tax (Report)* https://www.zoocasa.com/blog/ontario-property-tax-rates/

Population Demographics

53,203   *4.2% increase*   55,445

2011   2016

Age Distribution

Age	Population
65+	
40-65	
15-39	
0-14	

0   5,000   10,000   15,000   20,000   25,000

Median After-Tax Household Income

$82,804
Ontario

$90,550
Aurora

Municipal Tax Revenue

Millions

$60.00 — 0.50%
$50.00 — 0.45%
$40.00 — 0.40%
$30.00 — 0.35%
$20.00 — 0.30%
$10.00 — 0.25%
$- — 0.20%

2016 2017 2018 2019 2020 2021

■ Net Municipal Levy   — Municipal Tax rate

c. **Overview of Aurora:** Current Services Offering

A key component of the work conducted as part of this review was the corporate service inventory. Service profiles were developed for each service provided by the Town. This inventory has been shared as a separate database to be maintained on an ongoing basis and owned internally.

This service list has been identified by StrategyCorp, in consultation with staff, as the Municipality's "core service groupings." The profiles were then developed based on available data and financial information, augmented by discussions with key stakeholders involved in service delivery.

The Office of the Mayor and Council

Office of the CAO	Corporate Services	Finance	Planning and Development	Community Services	Operations
• Corporate Comms **(D)**	• Access Aurora **(L/D)** • Legislative Services/Records Management **(L)** • Information Technology **(D)** • By-law Services **(L/D)** • Human Resources **(L/D)** • Corporate Initiatives **(L/D)** • PMO **(D)** • Legal Services **(L/D)**	• Financial Reporting and Revenue **(L)** • Procurement Services **(L)** • Financial Management **(L)**	• Development Planning **(L/D)** • Policy Planning & Economic Development **(L/D)** • Building **(L/D)** • Engineering & Capital Delivery **(L/D)**	• Recreation/Special Events **(L/D)** • Culture **(L/D)** • Facilities Management **(L/D)** • Business Support **(D)**	• Roads **(L/D)** • Fleet **(L/D)** • Parks **(L/D)** • Solid Waste **(L/D)** • Water/Waste **(L/D)**

Note: Services delivered by York or Newmarket (e.g., Fire) were out of scope for this review.

Legislated vs. Discretionary Services

17%
12%
71%

Most of Aurora's services are legislated with additional discretionary components. This contributes to an overall higher standard of service than what is required by legislation. Council may choose to sustain this as it is welcomed by the community, but should continuously evaluate the scope of services to ensure value for investments.

LEGEND

|		
L	▉	Legislated Drivers
D	▉	Discretionary Drivers
L/D	▉	Service with Legislated and Discretionary Drivers

c. Overview of Aurora: Change Currently Underway

The following highlights key service delivery and continuous improvement initiatives already underway. They were not investigated further as part of the review but set the foundation for opportunities identified within this report.

Corporate Planning	Digitization	Continuous Improvement	New Services and Roles
Development of a new: • Fiscal strategy • Second generation Asset Management Plan • Culture master plan • Communications plan	Roll out of a new: • Human Resource Information System (HRIS)/ADPNow • Financial management system • eScribe for legislative services • ERP system to automate workflows and enable reporting functionality • Automated water meter read system • Software for business owners and plumbing contractors to complete backflow prevention tests • Fleet management software pilot to help increase preventative maintenance of fleet • Digital database for engineering drawings, enabling fasters responses to information requests • Contract management software within Legal Services	• Excellence Canada initiative • Procurement Modernization, resulting in new by-law, templates, and processes • Integrated Business Planning Process (IBPP) • Customer experience initiative • Change management initiative • CSR initiatives	• Bag Tag program • Green Bin collection at multi-residential properties • Updating by-law to make textiles a curb-side collection item • Formal Education Programs planned for 2023 • Shifting the Planning Clerk role to have a greater customer service focus, thereby improving customer experience and relieving capacity for Planners

While these initiatives are well planned and managed, it will be important to manage the people side of change through change management and ensure staff at all levels can embrace the desired future state for Aurora. Participants noted that pockets of change resistance (e.g., some lags in following new project management protocols) already exist within the organization, which may need additional attention moving forward.

3. Service Level Review & Related Opportunities
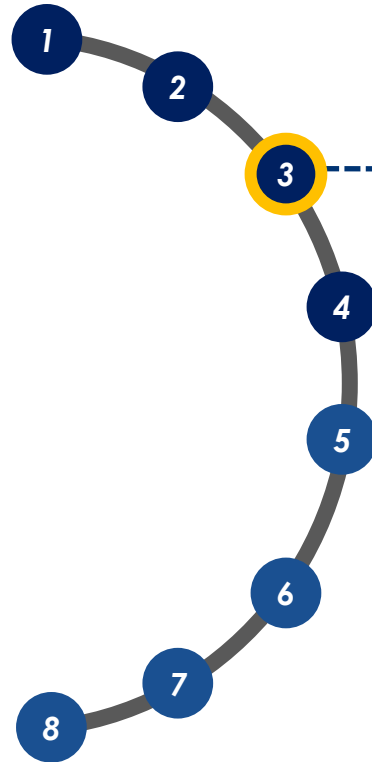
a. Service Level Current State

b. Improvement Opportunities
- Service-Driven
  o Enterprise-Wide
  o Department-Specific
- Continuous Improvement
  o Leading Municipal Practice
  o Innovative Practices

c. Growth Impact Analysis

a. Opportunity Analysis Overview and Key Definitions (1 of 2)

The following provides an overview of how each opportunity analysis is structured.

Service-driven opportunities were further evaluated to outline rationale, implementation considerations, and supporting leading practices and benchmarking analysis.

Continuous improvement opportunities were also further detailed for the Town's consideration.

Rationale & Description:
- Provides context on why this opportunity was identified.
- Outlines tactics that the Town can take and potential benefits associated with the opportunity.

Leading Practices / Benchmarking:
- Identifies relevant leading practices for the Town's consideration.
- Evaluates opportunity within the context of comparators.

Opportunity Explanation:
- Describes the leading municipal practice or innovations that the Town can adopt to continuously modernize operations.
- Provides case studies on innovations seen within other municipalities.
- Where relevant, provides benchmarking considerations for Aurora.

Implementation Considerations:
- Outlines financial analysis on potential revenues or cost savings that can be realized from the opportunity.
- Quantifies the estimated level of investment required to pursue this opportunity. Most initiatives leverage CMT capacity as the base value as it provides a median salary base from which to estimate costs. In reality, many tasks will be delegated up and down to implement the opportunity.
- Suggests time waves for implementation, each spanning 1-2 years.
- Identifies any risks or challenges with pursuing this opportunity.
- Assesses how different aspects of Aurora's operations will be impacted by the opportunity (see next slide for details).

a. Opportunity Analysis Overview and Key Definitions (2 of 2)

The following provides an overview of how each opportunity analysis is structured.

Service-driven opportunities were further evaluated to outline rationale, implementation considerations, and supporting leading practices and benchmarking analysis.

Rationale & Description:
- Provides context on why this opportunity was identified.
- Outlines tactics that the Town can take and potential benefits associated with the opportunity.

Leading Practices / Benchmarking:
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- Suggests time waves for implementation, each spanning 1-2 years.
- Identifies any risks or challenges with pursuing this opportunity.
- Assesses how different aspects of Aurora's operations will be impacted by the opportunity.

CHANGE IMPACT ASSESSMENT METHODOLOGY

The degree of impact that an opportunity would have on each of the following aspects of Aurora's operations was assessed.

Service Delivery — What and how services are delivered.

Processes — Functions and processes supporting service delivery.

Org Structure — Structure and design of staff within the organization.

Technology — Technological infrastructure supporting processes.

Data and Reporting — KPIs and tools to collect data on Town performance.

People and Culture — Culture enabling a high-performing internal team.

L: Would not significantly alter operations.
M: Would moderately change operations.
H: Would significantly transform operations.

a. Financial Analysis Assumptions and Methodology (1 of 2)

The following outlines the approach used to quantify the financial impacts of service driven opportunities. See Appendix D for more details.

CORE ASSUMPTIONS	METHODOLOGY AND LEADING PRACTICE ASSUMPTIONS

CORE ASSUMPTIONS

1. Municipal Data Sources

- Internal financial information
- Internal salaries and benefits data
- Municipal FIR data

2. Benchmarks

- StrategyCorp used a combination of secondary research (i.e., literature review) and in-house expertise to determine cost-saving benchmarks.

3. Application of Benchmarks

- Conservative estimates were used to calculate the base-values for applying the benchmarks.

METHODOLOGY AND LEADING PRACTICE ASSUMPTIONS

Potential Revenues
1. Identify comparable organizations offering similar service to assess respective revenues.
2. Based on comparator revenue data, use a conservative estimate for potential revenue gains at Aurora.

Investment
1. Leverage internal salaries and benefits data to estimate costs for positions that already exist within the organization.
2. Conduct desktop research to estimate costs for net new positions and other direct costs (e.g., software).

Cost Savings
1. Leverage internal budgets to identify direct cost savings (e.g., duplicate software programs).
2. Based on interviews, identify positions that are most likely to experience productivity savings.
3. Apply lower end of productivity saving benchmarks to a conservate salary-base (i.e., 30% of total salaries or salaries of minimum number of positions impacted).

PRODUCTIVITY SAVING	DESCRIPTION	LEADING PRACTICE BENCHMARK
People and Talent	People management (e.g., evaluation, feedback)	8-18%*
Digitization	Tech implementation and workflow automation	10-25%**
Standardizing Processes	Setting standards, KPIs, reducing duplication	5-10%***

*Source: Gallup. (2017). *Re-Engineering Performance Management.*
**Source: Work Market & KRC Research. (2020). *Work Market 2020 In(Sight) Report: What AI and Automation Really Mean for Work.*
***Source: Government Finance Officers Association. (2007). Performance Management: *Using Performance Measurement for Decision Making.*

a. Financial Analysis Assumptions and Methodology (2 of 2)

The following provides a further description of the benefits associated with each productivity saving.

PRODUCTIVITY SAVING	DESCRIPTION	LEADING PRACTICE BENCHMARK	BENEFITS *Savings associated with these benchmarks are productivity savings (i.e., what percent of a staff or group of staff member's time is saved from achieving this opportunity?). The following highlights examples of productivity benefits that will likely lead to productivity savings:*
People and Talent	People management (e.g., evaluation, feedback)	8-18%*	✓ Performance evaluation, feedback, training, and developmental coaching improves engagement and performance outcomes, driving efficiencies in how work is completed ✓ Improves retention which reduces recruitment and onboarding costs
Digitization	Tech implementation and workflow automation	10-25%**	✓ Reduces manual errors, increases speed at which tasks are completed, leads to better quality work products, and decreases labour costs
Standardizing Processes	Setting standards, KPIs, reducing duplication	5-10%***	✓ Reduces guess work and duplication ✓ Guarantees consistent quality for residents and boosts productivity when employees are empowered with standardized tools and practices to complete their work ✓ Improves resource allocation by better utilizing existing staff and reducing future needs for additional staff

Notes:
- These are productivity savings, not direct savings. Additionally, they will be realized once successful implementation has occurred over the identified timeline. Time and resource investments are required to implement opportunities and achieve these tangible and intangible benefits.

*Source: Gallup. (2017). *Re-Engineering Performance Management.*
**Source: Work Market & KRC Research. (2020). *Work Market 2020 In(Sight) Report: What AI and Automation Really Mean for Work.*
***Source: Government Finance Officers Association. (2007). Performance Management: *Using Performance Measurement for Decision Making.*

a. Service Level Current State

Service	Level	Current Performance
Corp. Comms.	WIP	N/A
Financial Reporting and Revenue	Y	At Standard
Procurement Services	Y	At Standard
Financial Management	Y	At Standard
Rec./Special Events	M	Mixed (At/Above)
Business Support	Y	Mixed (At/Above)
Facilities Mgmt	WIP	At Standard
Culture	M	Mixed (At/Below)

Service	Level	Current Performance
Roads	Y	At-Standard
Parks	Y	Mixed (At/Below)
Fleet	Y	At-Standard
Solid Waste	Y	At-Standard
Water/Waste	Y	Mixed (At/Above)
Dev. Planning	Y	Mixed (At/Below)
Building	Y	Mixed (At/Below)
Policy Planning & EcDev	Y	At Standard
Engineering & Capital Delivery	Y	Mixed (At/Above)

Service	Level	Current Performance
Access Aurora	M	Mixed (At/Above)
Legislative Services/Records Management	Y	Mixed (At/Above)
IT	M	At Standard
By-Law Services	Y, WIP	Mixed (At/Below)
HR	Y, WIP	At Standard
Corporate Initiatives	Y	Above Standard
PMO	Y	At Standard
Legal Services	Y	At Standard

Legend	Service Level		Current Service Performance		
	Y = Yes, N = No, M = Mix of Y and N, WIP = Work in Progress		Above, At, or Mixed (At/Above)	Mixed (At/Below)	Below

Service performance was assessed by documenting service standards in the Corporate Service Inventory and assessing performance against those existing standards through a combination of stakeholder input, financial analysis, benchmarking, and subject matter expert engagement.

b. Improvement Opportunities Context

The service level review identified that several service areas need to establish or update service levels. These have been identified in the corporate service inventory and will require further staff resourcing to address. Through research and analysis, a number of improvement opportunities were identified to improve service delivery or modernize the municipality. They are outlined below:

SERVICE-DRIVEN OPPORTUNITIES

- **Enterprise-Wide Service Opportunities (4):** These are themes that span across the organization and can benefit from an enterprise-wide solution.
- **Departmental Service Opportunities (17):** These are specific to a department, division, or service.

These opportunities have been developed further into opportunity profiles, which detail the rationale for change, service impact analysis, financial implications, and implementation considerations, among other areas.

CONTINUOUS IMPROVEMENT OPPORTUNITIES

- **Municipal Leading Practice (7):** These are opportunities that the Town may consider as part of broader efforts to modernize and continuously improve the organization. While they are not directly linked to a service, they provide the organizational infrastructure to improve service delivery. COVID-19 related opportunities are also included in this section; this refers to practices that were adopted during the pandemic that should continue into the future.
- **Innovation Opportunities (10):** These are innovation initiatives identified through a high-level policy/practice scan. Aurora can further explore these to position the municipality as a leader in modernization and innovation.

b. Summary of Service-Driven Opportunities

ENTERPRISE-WIDE	DEPARTMENT-SPECIFIC		
1. Establish service levels where gaps exist and adopt an annual service level review process. 2. Through the customer experience plan (CEP), establish internal service level agreements (SLAs) between departments to achieve enterprise-wide service levels. 3. Through the CEP, validate whether to keep customer service for Community Services separate from Access Aurora. 4. Through the CEP, better define the Town's value proposition to residents and improve access to services.	**Office of the CAO** 5. Shift Corporate Communication's focus away from administrative tasks towards more strategic ones. **Corporate Services** 6. Ensure recognition and capacity for Access Aurora's internal customer service initiatives. 7. Deliver off-site wedding services. 8. Bring clarity and consistent implementation to the SLAs between Legal Services and other Town Divisions. 9. Define a HR strategy linked to the Town's strategic plan.	10. Elevate the role of the PMO to focus on more enterprise-wide transformation projects. 11. Given clear increases in service level expectations and overall demand for by-law services, either align resourcing to meet demand, or decrease service levels. 12. In partnership with the region, transition to an Administrative Monetary Penalty System (AMPS). **Finance** 13. Review contracted services to ensure value-for-money and opportunities to improve service level. **Community Services** 14. Better empower and train front-line staff to manage customer requests. 15. Develop a Council-approved policy for Special Events Calendar planning.	16. Review mandate and resourcing of Facilities Management to ensure alignment with Town growth and Council expectations. 17. Review mandate and resourcing of Culture to ensure implementation of master plans. **Operations** 18. Digitize Road Occupancy Permit (ROP) application and develop by-law to enforce ROPs. **Planning and Development** 19. Expand functionality and utilization of CRM system. 20. Develop a Council-driven real-estate portfolio strategy. 21. In coordination with Community Services, explore the delivery of new business and community development services.

b. Summary of Continuous Improvement Opportunities

LEADING MUNICIPAL PRACTICES	INNOVATIVE PRACTICES
1. Drive greater alignment between the corporate strategic plan and Division-level priorities. 2. Build more collaborative partnerships between cross-functional support staff and service delivery staff. 3. Create an annual governance training plan for Council. 4. Increase focus on diversity and inclusion within service delivery to better reflect the Town's changing demographics. 5. Appropriately resource enterprise-wide initiatives, while defining and communicating clear roles and responsibilities. 6. Improve the intranet and increase its use to facilitate greater information sharing across departments. 7. Formalize and sustain practices put in place during the pandemic that proved to be effective.	**Resident and Business Needs and Preferences** 1. Accessible Public Wi-Fi 2. "Open Streets" initiatives 3. Climate Adaptation Planning 4. Participatory Budgeting **Improved Services and New Ways-of-Working** 5. Accommodating Hybrid Work 6. "Third Spaces" initiatives **Digital Transformation and Investments** 7. Digital Services and Payments 8. Open Data 9. Digital Engagement 10. "Smart Cities" Investments

The following slides contain a deeper dive on each of the opportunity areas. Service-Driven Opportunities are built out into Opportunity Profiles with financial analysis and relevant implementation considerations. Continuous Improvement Opportunities are further detailed with rationale, leading practices, benchmarking, and case studies.

Service Driven Opportunities – Enterprise Wide

OPPORTUNITY PROFILES of proposed initiatives that span across the organization and can benefit from an enterprise-wide solution.

b. Enterprise-Wide Service Opportunities (1 of 4)

Opportunity #1: Establish service levels where gaps exist and adopt an annual service level review process.

Rationale & Description: As identified in the Corporate Service Inventory (shared as a separate attachment), many service areas lack defined service levels, could benefit from documenting a more detailed version, or need to update them to align with the Town's growth. Implementing the service level recommendations contained within the Inventory will need to be prioritized to align the Town to best practices.

- There is opportunity to utilize the Inventory as a central repository for all service levels. The inventory should be updated annually during the budgeting process to ensure service levels are achievable given capacity. As part of this process, Aurora should also differentiate between service levels and KPIs.
- The Inventory can also serve as a repository for KPIs, as Aurora is encouraged to continue with development and implementation of a proven performance measurement framework to modernize service delivery.

Potential Revenues/Cost Savings

Cost Savings: Productivity savings of $515,000 per year from *Standardizing Processes.*

Risks/Challenges

Setting and continuously updating service levels can be a resource-intensive exercise. Establishing it as a formal annual responsibility, like budgeting, can reinforce accountability and enable more informed service decisions. Note: this does not need to be a formal review, but rather a pulse check to ensure the Town closely monitors the impact of growth on services.

Level of Investment

2-5% (or 1-2 weeks) of CMT capacity per year ($70,100 to $175,200).

Timing

Wave 1; followed by annual internal review of service levels during the budgeting process.

Change Impact Assessment

Service Delivery	H
Processes	H
Org Structure	M
Technology	L
Data and Reporting	M
People and Culture	L
Overall	M

Leading Practice/Benchmarking

Establishing clear service levels is a best practice for municipalities, irrespective of size or geography. Service levels allow organizations to identify key improvement areas and track progress over time. They are also a valuable onboarding tool for new staff. StrategyCorp proposes that all service levels be formally reviewed by Council every 4-year horizon, or that 25% of all service levels be formally re-examined each year.

b. Enterprise-Wide Service Opportunities (2 of 4)

Opportunity #2: Through the CEP, establish service level agreements between departments to achieve enterprise-wide service levels.

Rationale & Description: There are currently many interdependencies or areas of overlap between departments to deliver on their respective service levels. However, the expectations are not always coordinated, and some siloes exist between departments.

- For example: Service levels are set for the Development Planning team, but internal and external reviewers view that there isn't enough time to review applications, whereas applicants and customers view that approvals need to be accelerated. Capacity limitations within Engineering and Legal particularly impact timelines. The current service levels should be reviewed and discussed with partners. Any adjustments to service levels should be balanced against customer feedback. More capacity and resourcing should be discussed if Council would not like to modify or reduce the service level.
- The Town would benefit from taking an enterprise-wide view of service levels and ensuring they are achievable for all involved departments. This would involve establishing service level agreements (SLAs) between departments, which is already a proposed activity of the CEP and happening within some departments. There is also opportunity to emphasize a culture of communicating and understanding service levels, from leadership to the front-line.

Potential Revenues/Cost Savings

Cost Savings: Included in Opportunity #1 productivity savings.

Risks/Challenges

Depending on the interrelationships between services, defining internal SLAs can be an iterative process. As a result, it may take more time for some teams to fully deliver on the SLAs. However, there is value in the exercise as it enables cross-functional communication/collaboration.

Level of Investment

- 5-10% (or 2-5 weeks) of CMT capacity to establish internal SLAs ($175,200 to $350,500).
- Continual review and updates to SLAs included as part of Opportunity #1.

Timing

Wave 2.

Change Impact Assessment

Service Delivery	H
Processes	H
Org Structure	M
Technology	L
Data and Reporting	M
People and Culture	M
Overall	M

Leading Practice/Benchmarking

Leading practices on governmental internal service level agreements indicate that it is important to define scope, governance, operations, financial arrangements, performance, and implementation in an SLA (more details here).

b. Enterprise-Wide Service Opportunities (3 of 4)

Opportunity #3: Through the CEP, validate whether to keep customer service for Community Services separate from Access Aurora.

Rationale & Description: Staff identified several service similarities between Access Aurora and the customer service team within the Business Support Division (in the Community Services department). Opportunities to streamline these services were discussed (i.e., creating a one-stop-shop customer service model).

- Pilots have also been run in the past to explore service integration but there are challenges associated with integrating these services. For example, customer service representatives in the Community Services department require specific expertise on recreation programming and provide service mostly on-site at the facilities. Access Aurora is more focused on general customer service requests, which are often answered through the call centre or at Town Hall. Anecdotally, departments shared that many customers do not ask about recreation services at the Town Hall and vice-versa, many do not ask about Town services (e.g., billing) at recreation facilities. From a customer experience perspective, there is likely not a strong case to integrate the services.

- The CEP underway should leverage tactics like customer journey mapping to validate this service model or explore an appetite for more integrated customer service experiences, as seen in other jurisdictions like Newmarket (i.e., paying your tax bill when taking your kids to aquatics events). This could be coupled with additional innovation opportunities, such as becoming a cashless organization and establishing a knowledge management system.

Potential Revenues/Cost Savings
Cost Savings: Productivity savings of $45,300 per year from *Standardizing Processes.*

Risks/Challenges
There is low desire to pursue this integration internally and will require a strong business case to modify team structures. Another risk is maintaining cashiering functionality.

Level of Investment
Existing CEP.

Timing
Wave 3 – aligned to CEP timeline (Early 2022 to 2024).

Change Impact Assessment	
Service Delivery	H
Processes	H
Org Structure	H
Technology	M
Data and Reporting	M
People and Culture	H
Overall	H

Leading Practice/Benchmarking
In Newmarket, customer service functions fall within the Community Services department. Newmarket has also noted a decrease in total contacts made to their Customer Service Centre, largely driven by other digital service options (see here). Therefore, Aurora should also consider how digitization can centralize customer services.

b. Enterprise-Wide Service Opportunities (4 of 4)

Opportunity #4: Through the CEP, better define the Town's value proposition to residents and improve access to services.

Rationale & Description: Participants discussed the need to better communicate the value of the Town's services in a language that residents can understand. Council also expressed an opportunity to increase resident engagement through consultations and education on services.

- For established service levels and profiles, there is opportunity to communicate them publicly on the Town website to create greater transparency and accountability for residents and staff.
- Existing efforts to improve resident experience with services are underway through the CEP. As a result, the journey mapping exercises can be leveraged to identify key messages for residents and plan out how to centralize resident pathways. This work can also inform customer experience training for front-line staff by equipping them with knowledge of the Town's services and key messages.

Potential Revenues/Cost Savings

The primary benefit of this opportunity is achieving citizen engagement and satisfaction, rather than specific cost savings or revenue generation.

Risks/Challenges

When sharing service levels on the website, it is important to educate the public on how the municipality will achieve these standards, but unexpected factors can also impact performance (e.g., COVID-19 necessitated a higher level of parks maintenance than budgeted).

Level of Investment

- 5-10% (or 2-5 weeks) of Communications Coordinator capacity to update website ($4,700 to $9,500).
- Existing CEP.

Timing

Wave 3 – aligned to CEP timeline (Early 2022 to 2024).

Change Impact Assessment

Service Delivery	M
Processes	H
Org Structure	L
Technology	L
Data and Reporting	M
People and Culture	M
Overall	M

Leading Practice/Benchmarking

The City of Hamilton publicly shares service profiles (i.e., sub-services, type and driver of service, primary funding sources, service levels, and source of service levels) on its website (see here). Aurora can look to this as a best practice for future implementation.

Service Driven Opportunities – Department Specific

OPPORTUNITY PROFILES of proposed initiatives that are specific to a particular department, division, or service.

b. Departmental Profile: Office of the CAO

Service	Service Level*	Current Service Performance	FTE	2021 OpEx (% of total)
Corporate Communications: Provision of communications support to all departments of the organization for both internal and external communications.	• N, WIP for 2021	**N/A** due to missing agreed-upon standards	7	$848,000 (1%)

Service Improvement Opportunities
Opportunity #5: Shift Corporate Communication's focus away from administrative tasks towards more strategic ones.

*A more detailed version of service levels can be found in the Corporate Service Inventory shared with this report.

b. Improvement Opportunity: Office of the CAO – Corporate Communications

Opportunity #5: Shift Corporate Communication's focus away from administrative tasks towards more strategic ones.

Rationale & Description: With the current development of the 2022-2025 Communications Strategic Plan, it is an opportune time to assess the most strategic use of the communications team's time and expertise. There is growing demand from internal and external stakeholders/audiences (intensified by COVID-19).

- <u>Internally</u>, there are several departments that require frequent administrative, non-value-added communications support (e.g., scheduling social media posts, supporting special events, etc.) These types of request are often ad hoc, difficult to plan for, and can require more senior communications resources' time. It was estimated that 56% of the Corporate Communications team's collective time is spent focused on administrative tasks.

- <u>Externally</u>, there is currently a relatively low level of engagement with Aurora's media partners. As a result, there is limited coverage of Aurora in the media, which can make it more difficult to promote certain initiatives and events.

- As a priority under the unit's updated strategic plan and recent move to a portfolio model, and the drive to more 'business-like' relationships, administrative activities should be shifted to select individuals within other departments to allow the Corporate Communications team to better address the strategic, higher-impact activities. Specifically, more time should be allocated to proactive media relations support.

Revenues/Cost Savings
None. This would be a reallocation of staff time to higher impact activities.

Risks/Challenges
The decentralization of certain administrative communications responsibilities may result in a decreased line of sight of the unit. This can be addressed by keeping relevant staff apprised of relevant activities as needed.

Level of Investment
Pending review, potential increase in salaries if positions are reclassified.

Timing
Wave 2.

Change Impact Assessment	
Service Delivery	L
Processes	M
Org Structure	L
Technology	L
Data and Reporting	L
People and Culture	M
Overall	L

Leading Practice/Benchmarking
It is leading practice for mature organizations (public and private) to have centralized communications functions, but to decentralize certain activities by enabling staff within departments to carry out the more administrative tasks (e.g., certain types of social media posts and special events), so that the functional group can focus on strategic activities (e.g., proactive media relations, stakeholder engagement, public reports, etc.).

b. Departmental Profile: Corporate Services (1 of 3)

Service	Service Level*	Current Service Performance	FTE	2021 OpEx (% of total)
Corporate Initiatives: Management of the corporate initiatives' modernization portfolio. The modernization portfolio includes the development, adoption, enhancement and sustainment of key enterprise-wide improvement initiatives.	• Y, Project timelines and budget • Y, Emergency Management annual compliance requirements • Suggest developing more service levels aligned to project outcomes (e.g., % of objectives met)	Above Standard	1	$128,000 (<1%)
Human Resources: Internal support service to enrich the culture and performance of the Town through integrated business solutions, while incorporating a partnership-based, customer service approach to serving the organization.	• Y, compliance to legislative requirements • Emphasize developing internal service level agreements with Town Divisions/Departments	At Standard	7	$1,089,700 (2%)
Access Aurora: Front line customer service hub for both residents/public and internal departments.	• Y, Rely on legislated timelines • Suggest completing an exercise to specify and document service standards	Mixed (At /Above Standard)	7-11	$984,800 (1%)
Legislative Services: Fulfill duties relating to Council/Committee Secretariat, as well as the storage and efficient retrieval of records.	• Y, 48-hour response to records request, compliance with legislated timelines, FOI requests answered within 30 days	Mixed (At/Above Standard)	5	$792,200 (1%)

*A more detailed version of service levels can be found in the Corporate Service Inventory shared with this report.

b. Departmental Profile: Corporate Services (2 of 3)

Service	Service Level*	Current Service Performance	FTE	2021 OpEx (% of total)
Project Management Office: Responsible for development, training, and maintaining the corporate project management and change management methodology.	• Y, aligned to industry project management standards • Suggest completing an exercise to document and communicate service standards	At Standard	1	$143,400 (<1%)
Legal Services: Legal services pertaining to general municipal support; planning and development; insurance, claims, litigations and risk management; Real Estate.	• Y, meeting deadlines, reviewing agreements per set standards, meeting budget	At Standard**	7	$1,801,500 (3%)
IT: Responsible for managing the Town's IT architecture including IT support, project management, installation, maintenance, customer service, and asset management.	• Y, response times for Service Desk, Infrastructure, GIS, Business Solutions, Database Administration • N, IT Governance, Change Management, Project management, Business Analysis, Project Portfolio Management • In process of creating internal SLAs for all sub-services	At Standard	16	$3,293,100 (5%)
By-law Services: Provides enforcement services for all municipal by-laws and animal services.	• Y, more defined service levels under development and not publicly available at this time • Below Standard at certain periods due to increased volumes and low capacity	Mixed (At/Below Standard)	14-18	$1,757,000 (2%)

*A more detailed version of service levels can be found in the Corporate Service Inventory shared with this report.

**Current service performance is based on existing service levels. Some services lack comprehensive service levels and therefore, this assessment may not be fully reflective of the service experience of internal clients or external residents. Further efforts are required to develop and document detailed service levels.

b. Departmental Profile: Corporate Services (3 of 3)

Service Improvement Opportunities
Opportunity #6: Ensure there is recognition and capacity for the internal customer service initiatives that Access Aurora takes on and reinforce SLAs between Access Aurora and other departments.
Opportunity #7: Deliver off-site wedding services to the community.
Opportunity #8: Bring clarity and more follow-through to the Service Level Agreements (SLAs) between Legal Services and other Town Divisions.
Opportunity #9: Define an HR strategy linked to the corporate strategic plan.
Opportunity #10: Elevate the role of the PMO to focus on more enterprise-wide transformation projects.
Opportunity #11: Given clear increases in service level expectations and overall demand for by-law services, either align resourcing to meet demand, or decrease service levels.
Opportunity #12: In partnership with the region, transition to an Administrative Monetary Penalty System (AMPS).

b. Improvement Opportunity: Corporate Services – Access Aurora (1 of 2)

"The Access Aurora staff are lovely."
– Aurora Resident

Opportunity #6: Ensure there is recognition and capacity for the internal customer service initiatives that Access Aurora takes on and reinforce SLAs between Access Aurora and other departments.

Rationale & Description: In addition to managing the reception area and call centre, the Access Aurora team triages mail, scans tax and water bills for other employees who work from home and has couriered packages to all staff during the pandemic.

- There has been a tendency for remote staff to rely on Access Aurora more to scan and send over bills and invoices. Completing these additional duties directly impacts their capacity to complete other customer service responsibilities and has impacted staff morale. The mail room process was identified as particularly high-priority.
- A recent SLA was developed to better define roles and responsibilities between Access Aurora and other Town departments. This directly supports Enterprise-wide Opportunity #2, which promotes development and reinforcement of internal SLAs. Aurora is encouraged to dedicate implementation and change management resources to ensure this SLA is followed, to help alleviate unnecessary strain on Access Aurora staff.

Revenues/Cost Savings
10% of Customer Service Representative time at $47,500 by *Standardizing Processes*.

Risks/Challenges
This opportunity arose from the work-from-home transition. The future work model remains an uncertainty, and therefore, this challenge may be mitigated through post-pandemic work practices.

Level of Investment
Implementation of existing SLA.

Timing
Wave 1.

Change Impact Assessment	
Service Delivery	L
Processes	M
Org Structure	M
Technology	L
Data and Reporting	L
People and Culture	M
Overall	M

Leading Practice/Benchmarking
• Administrative burden: Balancing strategic/core functional tasks and administrative tasks is a sign of organizational maturity. • Mailroom: the City of Toronto mail is managed by the City Clerk's Office; the Town of Oakville mail is managed within the Political Governance Department; and the Town of Newmarket mailroom services are managed by Procurement.

Source: Harvard Business Review (2013). *Make Time for the Work that Matters* https://hbr.org/2013/09/make-time-for-the-work-that-matters.

b. Improvement Opportunity: Corporate Services – Access Aurora (2 of 2)

Opportunity #7: Deliver off-site wedding services to the community.

Rationale & Description: Aurora currently issues marriage licenses but has an opportunity to deliver more comprehensive wedding services, particularly off-site – as seen in the Town of Newmarket. This has anecdotally emerged as an unmet need in the community and has been reinforced through the recent lockdowns and gathering restrictions.

- This service would entail the administration of a civil ceremony by a certified officiant and be held either at the municipal offices (or potentially at the new Aurora Town Square when complete) or off-site.

Revenues/Cost Savings

Revenues: $450 - $580 per ceremony.*
At 50% of Newmarket's projected 2019 revenues for wedding ceremonies, Aurora can expect revenues of ~$62,700 per year.

Risks/Challenges

There may be some duplication of service and Aurora should consult with Newmarket prior to launching this service.

Level of Investment

Using a conservative 80% estimate of Newmarket's budgeted costs for wedding ceremonies, expect annual investment of ~$20,800.

Timing

Wave 1.

Change Impact Assessment

Service Delivery	H
Processes	M
Org Structure	M
Technology	M
Data and Reporting	L
People and Culture	L
Overall	M

Leading Practice/Benchmarking

- The Town of Newmarket offers off-site wedding services at a cost to residents.*
- The City of Markham offers enhanced marriage services including venue bookings, photographers, and officiants.**
- The City of Toronto is considering offering enhanced marriage services and is currently holding public consultations.***

*Source: Newmarket Civil Ceremony Services, https://www.newmarket.ca/LivingHere/Pages/Civil%20Ceremonies/Civil-Ceremony-Fees.aspx
** Source: Markham Wedding Services, https://www.markham.ca/wps/portal/home/permits-licenses-taxes/wedding-services/04-wedding-services
*** Source: City of Toronto Wedding Services, https://www.toronto.ca/services-payments/venues-facilities-bookings/getting-married/

b. Improvement Opportunity: Corporate Services – Legal Services

Opportunity #8: Bring clarity and more follow-through to the Service Level Agreements (SLAs) between Legal Services and other Town Divisions.

Rationale & Description: Several opportunities were identified to improve workflow between legal services and Town Divisions, such as:

- More tracking and transparency of internal legal processes and Service Level Agreements around real-estate acquisitions and disposals.
- Clarity on which Division is responsible for follow-ups and addressing information gaps on development agreements.
- Sharing all requested materials to Legal, in time for them to start developing the contracts.
- Consistently using a contract and document management software system with enough licenses (i.e., Laserfiche) to standardize contracts across the organization. This should include electronic signing capabilities.

There is an opportunity to review, educate, and reinforce the SLAs governing collaboration between Legal Services and other Town Divisions (this directly supports Enterprise-wide Opportunity #2).

Revenues/Cost Savings
Cost Savings: Included in productivity savings of Opportunity #1.

Risks/Challenges
This can become an enterprise-wide initiative as legal processes are dependent on multiple departments. SLAs alone may not be enough and additional resourcing may be required.

Level of Investment
Included in level of investment related to Opportunity #2.

Timing
Wave 2.

Change Impact Assessment	
Service Delivery	M
Processes	H
Org Structure	L
Technology	L
Data and Reporting	L
People and Culture	M
Overall	L

Leading Practice/Benchmarking
Developing SLAs supports the achievement of higher service standards, improves interdepartmental working relationships, and promotes information sharing. Service level-aligned SLAs can make service delivery more consistent and reliable, improve customer experience, and enhance interdepartmental interaction enterprise-wide.

b. Improvement Opportunity: Corporate Services – Human Resources

Opportunity #9: Define an HR strategy linked to the corporate strategic plan.

Rationale & Description: There is opportunity to develop an HR Strategic Plan to best position the Town for future capability and talent needs. This can inform a long-term talent management strategy that includes professional development, diversity and inclusion, and workforce investments for the future.
- ELT identified opportunities to elevate the skill sets of staff and Council and prepare them to tackle Aurora's future needs (e.g., Planners to support focus on infill development, governance training for Council). Some departments also noted a high turnover of unionized front-line staff and an opportunity to invest in their growth through training and education. An internal focus on diversity and inclusion also emerged as a key theme to explore in an HR strategy.
- To implement the strategy, Aurora should continue to leverage existing partnerships with the N6 to deliver a more comprehensive learning and development service to employees, as currently HR's capacity is limited to onboarding and basic training requirements.

There is also opportunity to explore additional partnerships with external training providers (e.g., on governance solutions for Council).

Revenues/Cost Savings
Cost Savings: Productivity savings of $824,000 per year from investing in *People and Talent.*

Risks/Challenges
Most municipalities are rethinking people and talent strategies, and Aurora should leverage its N6/regional partnerships to develop its HR strategy.

Level of Investment
• 10% of HR manager's time costing $17,900. • 2%* (or 1 week) of all staff capacity per year to participate in training ($686,700).

Timing
Wave 2.

Change Impact Assessment	
Service Delivery	H
Processes	M
Org Structure	H
Technology	L
Data and Reporting	M
People and Culture	H
Overall	H

Leading Practice/Benchmarking
Having an HR strategy is best practice for mature organizations. • The City of Toronto developed a "Talent Blueprint" in 2017. See here. • The City of Kawartha Lakes developed a Human Resource Management Strategy to supplement its Strategic Plan. See here. • The "N6" is developing a future of work study which Aurora can learn from.

Leading practice is to set a training budget that is 2-5% (4-5% for gold standard) of staff salary & benefits budget. Aurora currently spends ~$231,000 on staff training (mandatory and discretionary).

b. Improvement Opportunity: Corporate Services – Project Management Office (PMO)

Opportunity #10: Elevate the role of the PMO to focus on more enterprise-wide transformation projects.

Rationale & Description: Demand on the Town's PMO function is increasing. As the organization matures and takes on more transformational projects, there is an opportunity to raise awareness of the value and services provided by the PMO to better leverage its tools and expertise. This could involve:

- Assigning a project management budget within projects and engaging PMO when it makes sense to have them project manage the work. Note, at times, it may be more feasible for a service-oriented subject matter expert to do the project management.
- Having the CAO issue a mandate statement that provides PMO (and Corporate Services) with the leadership oversight necessary for large-scale enterprise-wide projects. The definition for "enterprise-wide" projects is currently under review by the Town, and this process is in its final stages.
- Communicating PMO's capabilities to the organization via internal communication (e.g., Listserv/email, intranet, 'lunch and learn', etc.).

Revenues/Cost Savings
Cost savings calculated as the amount of time saved by the Project Manager through *Standardizing Processes* at $8,000 annually.

Level of Investment
5% of PMO's time to focus on transition over one year, costing $8,100.

Change Impact Assessment	
Service Delivery	M
Processes	H
Org Structure	H
Technology	L
Data and Reporting	L
People and Culture	M
Overall	M

Leading Practice/Benchmarking
• Guelph (Corporate Project Management Office), Vaughan (Office of Transformation and Strategy), and Caledon (Corporate Strategy and Innovation Department) organize their project management office (or equivalent) within a department. • Brampton includes its project management function as a direct report to the CAO.

Risks/Challenges
Change management will be required to transition PMO to more enterprise-wide functions.

Timing
Wave 2.

b. Improvement Opportunity: Corporate Services – By-Law Services (1 of 2)

Opportunity #11: Given clear increases in service level expectations and overall demand, either align resourcing to meet demand, or decrease service levels.

Rationale & Description: By-law services has seen a 30% increase in call/complaint volumes since the onset of COVID-19 and while the unit does receive additional seasonal resourcing to address the volume uptick in the spring and summer seasons, there have been no net new permanent resources hired since 2019. This has resulted in a slight dip in service speed but has also highlighted the lack of visibility and awareness Council and the public (external stakeholders) have into call volumes and service levels. There is a sometimes-misguided perception that by-law officers are always available on-call, and when experiencing delays without clear expectations on wait times, residents can become frustrated.

- There is an opportunity to assess current service levels, whether they align with Council and public expectations, and either a) increase resources to maintain service levels, or b) decrease service levels. In both scenarios there must be a communications exercise to develop and publicly promote by-law service levels/response times.

- Exploring greater functionality in CityView or other Citizen Request Management (CRM) options that can be integrated with the Access Aurora phone system should be considered to allow for consolidated service requests in a single hub.

Revenues/Cost Savings
To be determined through a further resourcing assessment.

Risks/Challenges
Culture change to change public perception is a long-term change management effort.

Level of Investment
The $92,000 CityView upgrade accounted for in the 10 Yr. Capital Budget.

Timing
Wave 1.

Change Impact Assessment	
Service Delivery	H
Processes	M
Org Structure	L
Technology	M
Data and Reporting	M
People and Culture	H
Overall	M

Leading Practice/Benchmarking
The use of CRM systems is considered leading practice to enable better service and data collection. As these programs become more refined, they can be integrated with phone and web systems. Most of Aurora's comparators have some form of this tool.

b. Improvement Opportunity: Corporate Services – By-Law Services (2 of 2)

Opportunity #12: In partnership with the region, transition to an Administrative Monetary Penalty System (AMPS).

Rationale & Description: Aurora can benefit from transitioning to an AMPS. This model was created to assist over-burdened courts by streamlining ticket disputes and allowing municipalities a more efficient way to enforce by-laws. It reduces the congestion in provincial courts and allows for better use of court time and resources for more serious matters.
- For Aurora, this can create further efficiencies for the by-law team by addressing backlogs, better utilize judicial resources by removing officers from courts, improve access to the justice system and customer experience, and generate increased revenues.
- Adoption of an AMPS is seen across the region. York Region has adopted an AMPS with Markham, Vaughan, and Richmond Hill, and is hoping to partner with Aurora. Newmarket has also fully transitioned to AMPS.

Revenues/Cost Savings

To illustrate potential revenue generation:
Aurora currently has ~$13,845 in parking fines pending from 2020. Assuming AMPS can recover ~80% of expired fines, AMPS could have resulted in ~$11,000 of additional revenue last year.

Risks/Challenges

Change management internally and with residents will be crucial to successful adoption.

Level of Investment

10% of by-law manager's time costing $14,300.

Timing

Wave 2.

Change Impact Assessment

Service Delivery	H
Processes	H
Org Structure	L
Technology	H
Data and Reporting	M
People and Culture	M
Overall	**H**

Leading Practice/Benchmarking

- The Town of Newmarket implemented the AMP system in 2019. See here for the by-law.

b. Departmental Profile: Finance

Service	Service Level*	Current Service Performance	FTE	2021 OpEx (% of total)
Financial Reporting: All general accounting (e.g., financial statements, FIR reporting, payroll, general A/P etc.).	• Y	At Standard	11	$1,140,800 (2%)
Financial Revenue: All revenue activities (e.g., property tax and water billing, general A/R).	• Y	At Standard		
Procurement Services: Work with internal clients to assist with procurement and service bidders and vendors.	• Y, response to inquiry • WIP, overall timelines for procurement to be defined by modernization project and ERP updates in 2022 • Procurement timelines viewed as too long currently and emphasize developing internal service level agreements with Town Divisions/Departments	At Standard**	4	$545,400 (1%)
Financial Management: Financial advice, cash flow/investment portfolio management, operating and capital budget administration, grant management, asset management support.	• Y • Suggest completing an exercise to specify and document service standards	At Standard	5	$699,500 (1%)

Service Improvement Opportunities

Opportunity #13: Review contracted services to ensure value-for-money and opportunities to improve service level.

*A more detailed version of service levels can be found in the Corporate Service Inventory shared with this report.
**Current service performance is based on existing service levels. Some services lack comprehensive service levels and therefore, this assessment may not be fully reflective of the service experience of internal clients or external residents. Further efforts are required to develop and document detailed service levels.

b. Improvement Opportunity: Finance – Financial Management

Opportunity #13: Review contracted services to ensure value-for-money and opportunities to improve service level.

Rationale & Description: In comparison to peers, Aurora has a higher reliance on external contractors (see benchmarking below). There is value in reviewing the level of contracted services as an ongoing best practice. Participants discussed benefits of bringing some services in-house, such as more flexibility over staff deployment and increasing service levels, but also acknowledged that it could be more costly for the municipality to directly deliver a service. There is an opportunity to undertake a thorough analysis of service alternatives to ensure that the current contracted services approach is providing best value. There is also an opportunity to enhance contract management skills among managers to prevent overspending.

Revenues/Cost Savings

Cost Savings: Potential savings of $217,000 per year.**

Risks/Challenges

There is limited research on whether contracting is more effective than delivering in-house for municipal services. It will vary by service and the value of bids received from third-parties. Therefore, Aurora should also consider other factors in bringing services in-house such as improved quality of service, increased local capacity, greater flexibility for the municipality.

Level of Investment

2-5% (or 1-2 weeks) of CMT capacity to assess contracts upon renewal ($70,100 to $175,200).

Timing

Prior to contract renewal (varies by contract).

Change Impact Assessment

Service Delivery	H
Processes	H
Org Structure	H
Technology	L
Data and Reporting	M
People and Culture	M
Overall	H

Leading Practice/Benchmarking

Even when removing spending on **Fire, Water, and Wastewater contracted services** from all municipalities, Aurora spends the highest among its comparators.

Comparator	% of OpEx spent on Contracted Services (excl. Fire, W&W)
Aurora	30%
Newmarket	29%
Oakville	23%
Caledon	7%
Halton Hills	12%
Ajax	7%

Source: Municipal FIR data. More benchmarking data available in Appendix B.
*** A recent McKinsey report on procurement strategy indicates organizations can save between 1-10% by more carefully screening the supplier market, aggressively negotiating conditions and utilizing robust contractor management tools to attain cost transparency. Source: McKinsey & Company. (2016). Value Creating Purchasing.*

b. Departmental Profile: Community Services (1 of 2)

Service	Service Level*	Current Service Performance	FTE	2021 OpEx (% of total)
Recreation/Special Events: Delivery of sports, fitness, recreation, and special events programming.	• Y for community programs, fitness, aquatics • WIP for sports • N for special events (identified as Above Standard but suggest completing an exercise to specify and document more detailed service levels)	Mixed (At/Above Standard)	46	$4,823,700 (7%)
Business Support: Supporting local businesses and residents with facility booking, contract/lease management, and recreation and special events customer service.	• Y • Facilities Sponsorship and Advertising are Above Standard	Mixed (At/Above Standard)	15.4	$1,729,100 (2%)
Facilities Management: Operating and managing all Town facilities.	• WIP (via Asset Management Plan)	At-Standard	21	$7,633,000 (11%)
Culture: Delivery of cultural, public art, and museum programming.	• Y for cultural programming • N for culture policies and strategies, Downtown revitalization, public art, or museum services • Suggest completing an exercise to specify and document more detailed service levels	Mixed (At/Below Standard)	6	$879,100 (1%)

*A more detailed version of service levels can be found in the Corporate Service Inventory shared with this report.

**Current service performance is based on existing service levels. Some services lack comprehensive service levels and therefore, this assessment may not be fully reflective of the service experience of internal clients or external residents. Further efforts are required to develop and document detailed service levels.

b. Departmental Profile: Community Services (2 of 2)

Service Improvement Opportunities
Opportunity #14: Better empower and train front-line staff to manage customer requests.
Opportunity #15: Develop a Council-approved policy for Special Events Calendar planning.
Opportunity #16: Review mandate and resourcing of Facilities Management to ensure alignment with Town growth and Council expectations.
Opportunity #17: Review mandate and resourcing of Culture to ensure implementation of master plans.

b. Improvement Opportunity: Community Services – Recreation

"I am generally very satisfied with the services I have used, especially recreation opportunities through Town programs and the Seniors' Centre." – Aurora Resident

Opportunity #14: Better empower and train front-line staff to manage customer requests.

Rationale & Description: Managers or supervisors generally work regular business hours. Front-line recreation staff work evenings and weekends on a part-time basis, which is the prime time for business. As a result, front-line staff can lack access to management and may not always be able to make real-time service decisions or can feel pressured with more responsibilities. This can often directly impact service delivery when faced with urgent resident requests.

- Supervisors currently make site visits at least twice during an 8-week session for each program, of which there are 50 total. In other instances, Supervisors are accessible by phone.
- There is opportunity to empower and train front-line staff to better manage these situations (e.g., more frequent Supervisor site visits, creating part-time Supervisor roles, training sessions for front-line staff to be better equipped in customer service when Supervisors are not available).

Revenues/Cost Savings

Cost Savings: Included in productivity savings of Opportunity #9 (staff learning and development).

Risks/Challenges

Given the number of programs and sites, it may not always be feasible for Supervisors to visit sites more frequently, in addition to performing their day-to-day responsibilities. Therefore, there will need to be a heavy focus on customer service training.

Level of Investment

Included as part of Opportunity #9 investments (staff learning and development).

Timing

Wave 2.

Change Impact Assessment

Service Delivery	M
Processes	M
Org Structure	L
Technology	L
Data and Reporting	L
People and Culture	H
Overall	M

Leading Practice/Benchmarking

This opportunity was further explored by benchmarking Aurora's staffing composition against comparators. There are limitations to benchmarking the FT:PT staffing ratio with comparators, as the data available combines Parks and Recreation staff and there are significant variances between the ratios (indicating that there is likely no ideal staffing mix). E.g., Aurora has a FT:PT ratio of 80:282, whereas Newmarket has 76:71 for this service.*

*Source: Municipal FIR data. More benchmarking data available in Appendix B.

b. Improvement Opportunity: Community Services – Special Events

"The special events are amazing and so personalized, other towns and cities don't do as well of a job." – Aurora Resident

Opportunity #15: Develop a Council-approved policy for Special Events Calendar planning.

Rationale & Description: An annual Special Events Calendar is developed and includes room for ad hoc requests and contingencies throughout the year. However, sometimes the Special Events team is required to host more ad hoc events than originally budgeted, which causes capacity challenges for staff and impacts the ability to deliver quality service.
- There is opportunity to formalize this process further by developing a Council-approved policy on how those ad hoc requests will be managed, including developing a Council-approved evaluation criteria to prioritize proposals.
- The policy would also establish clear controls to not increase the service levels without dedicating extra resources (i.e., hosting more events than budgeted).

Revenues/Cost Savings
Cost-savings: Productivity savings of $23,000 per year from *Standardizing Processes.*

Risks/Challenges
COVID-19 and related public health measures have disrupted events programming around the world. There is likely to be some uncertainty around events planning over the next 12-18 months.

Level of Investment
5-10% (or 2-5 weeks) of Manager, Recreation capacity to drive policy development ($7,100 to $14,300).

Timing
Wave 1.

Change Impact Assessment

Service Delivery	H
Processes	M
Org Structure	L
Technology	L
Data and Reporting	L
People and Culture	M
Overall	M

Leading Practice/Benchmarking
- The City of Sarnia have a Festival and Event Policies & Procedures Manual that serves as the guiding document to manage festivals and events that benefit the City and its citizens (see here).
- The Town of Richmond Hill has developed a Festival and Events Strategy that aligns decision-making on events to the Town's Strategic Plan and Cultural Plan (see here). Pg. 34-41 outline an evaluation framework for events.

b. Improvement Opportunity: Community Services – Facilities Management

Opportunity #16: Review mandate and resourcing of Facilities Management to ensure alignment with Town growth and Council expectations.

Rationale & Description: The Town has three new facilities under development, requiring more support from Facilities Management. The Facilities Management currently relies heavily on part-time staff, and part-time staff turn over more quickly by nature, requiring more training. This also impacts the quality of service.

- Full-time staff can provide more long-term and consistent service. To keep up with growth and maintain service levels, the Town can explore hiring more full-time staff members rather than relying on part-time staff members.
- There is limited publicly available data across comparators on the FT:PT staff ratio within Facilities Management. Notably, some municipalities focus on ratios of FTE:facility. This could serve as a helpful metric for Aurora in identifying service levels. Assigning an FTE count can then provide the Division with flexibility on staffing composition (i.e., part-time vs. full-time vs. seasonal).

Revenues/Cost Savings
Cost Savings: To be determined by resourcing review.

Risks/Challenges
- The hiring process for full-time employees can be more costly and resource-intensive. Additionally, full-time employees can drive up additional costs in wages, benefits, and payroll taxes. - Resourcing requirements will be better informed by the updated Asset Management Plan as it will inform what level of service is required to keep up with aging municipal infrastructure.

Level of Investment
5-10% (or 2-5 weeks) of Manager, Facilities Management capacity to drive review ($8,000 to $16,000).

Timing
Wave 2.

Change Impact Assessment

Service Delivery	H
Processes	M
Org Structure	L
Technology	L
Data and Reporting	L
People and Culture	M
Overall	M

Leading Practice/Benchmarking
Key trends like digitization (i.e., facilities management software, smart devices and controls, digital security, automation etc.), climate change and Town growth will impact facilities management in the medium to long-term. In addition to future staff needs, Facilities Management should also consider building internal capabilities to keep up with innovations and strategic investments needed for the future.

b. Improvement Opportunity: Community Services – Culture

Opportunity #17: Review mandate and resourcing of Culture to ensure implementation of master plans.

Rationale & Description: A number of Culture subservices have been identified as performing below-standard (i.e., Culture Policies and Strategies, Support Economic Development and Downtown Revitalization, and Public Art), which is attributed to a lack of capacity to develop, oversee, and implement master plans.

- There is a specific opportunity to hire a Cultural Programmer to deliver on cultural programming at or near par with the recreation programming service level (for Culture Policies and Strategies and Cultural Programming). This resource can also support the development of a Public Art Master Plan, including commissioning, curatorial, maintenance, and conversation. There is also opportunity for Cultural Programmers to work more closely with Recreation programmers, given the alignment in job descriptions and duties.
- With Culture being a Council priority, there is opportunity to appropriately resource the service area with a Manager-level position.

Revenues/Cost Savings
N/A.

Risks/Challenges
There might be limited funds to resource the new positions in the Culture Division. Should Council pursue this as a priority, there is opportunity to dedicate internal capacity to apply for federal, provincial, and other external grants.

*Source: 2019 Performance Measurement Report by the MBNC.

Level of Investment
Hiring a Culture Programmer (or similar position) and Manager of Culture (included in existing Town Square budget).

Timing
Wave 1.

Change Impact Assessment	
Service Delivery	H
Processes	M
Org Structure	H
Technology	L
Data and Reporting	L
People and Culture	M
Overall	M

Leading Practice/Benchmarking
According to the 2019 Performance Measurement Report by the Municipal Benchmarking Network Canada (MBNC), the median total cost of providing culture services per capita was $26.95 in 2019. Aurora currently spends ~$13.8 per capita.* While MBNC looks at considerably larger municipalities, there is still a large discrepancy between the per capita spending between Aurora and leading municipalities.

b. Departmental Profile: Operations

Service	Service Level*	Current Service Performance	FTE	2021 OpEx (% of total)
Water, Wastewater, Stormwater: Planning, operating, and maintaining all Town-owned water, wastewater, and storm operations.	• Y for Water • Y for Wastewater • Y for Stormwater	Mixed (At/Above Standard)	10	$23,487,300 (33%)
Roads: Planning, operating, and maintaining all Town-owned roads.	• Y	Mixed (At/Above Standard)	14	$4,415,000 (6%)
Solid Waste: Collecting garbage, recycling, yard waste and organic waste in the Town.	• Y (via Contract)	At-Standard	1	$2,836,700 (4%)
Parks: Planning, operating, and maintaining all Town-owned parks.	• Y (At Standard most of the time, but can be Below Standard when there is high demand and/or due to extenuating circumstances (e.g., weather)	Mixed (At/Below Standard)	21	$3,374,500 (5%)
Fleet: Maintaining all Town vehicles.	• Y	At-Standard	5	$900,100 (1%)

Service Improvement Opportunities

Opportunity #18: Digitize Road Occupancy Permit (ROP) application and develop by-law to enforce ROPs.

*A more detailed version of service levels can be found in the Corporate Service Inventory shared with this report.

b. Improvement Opportunity: Operations – Roads

Opportunity #18: Digitize Road Occupancy Permit (ROP) application and develop by-law to enforce ROPs.

Rationale & Description: The current ROP application process is paper and email-based, making it more difficult than necessary for contractors and homeowners to submit applications and track the status. In addition, ROPs are not enforceable via a by-law. The combination of these two factors can lead to users not applying for ROPs, resulting in complaints from other residents, obstructed roadways or sidewalks, and other unforeseen consequences associated with the work or activity.

- As part of overall digitization and modernization opportunities, Aurora should digitize the ROP application process to allow contractors and homeowners to submit applications and receive confirmation emails. There is an opportunity for this type of service request to be managed through a similar program to what might be used for by-law.

- The development of and ROP by-law should also be drafted to incentivize contractors and homeowners to apply for ROPs, and to abide by them.

Revenues/Cost Savings

10% of staff time spent on ROP related activities time at $7,500 by *Digitization.*

Risks/Challenges

While Operations would be the lead department for this, it will require capabilities and resources from other divisions as well (e.g., Building, Engineering & Capital Delivery, By-law, and IT).

Level of Investment

Price of integrating form into updated website (low to zero cost).

Timing

Wave 1.

Change Impact Assessment

Service Delivery	H
Processes	M
Org Structure	L
Technology	M
Data and Reporting	H
People and Culture	M
Overall	M

Leading Practice/Benchmarking

- As municipalities update their websites, these types of forms are increasingly being built out as pages that often integrate with a software like CityView, which Aurora has already prioritized as part of its Technology Strategic Plan.
- Many comparable municipalities such as Newmarket, Ajax and Caledon have ROP by-laws.

b. Departmental Profile: Planning and Development (1 of 2)

Service	Service Level*	Current Service Performance	FTE	2021 OpEx (% of total)
Development Planning: Review and processing of planning applications; responding to inquiries on development potential, application status, and planning process.	• Y • Below Standard when there are delays in review by internal staff or external agencies • Emphasize developing service level agreements with Town Divisions/Departments and external stakeholders	Mixed (At/Below Standard)**	8	$1,098,300 (2%)
Building: Review of building permit applications, building permit inspections, address complaints regarding land use, providing zoning information.	• Y • Below Standard during busy periods (construction was down in 2020, which has caused a high level of applications in 2021)	Mixed (At/Below Standard)	12	$2,527,700 (4%)
Policy Planning/Economic Development: Responsible for economic development, policy direction for the Town from Official Plan/zoning, and overall policy monitoring with the Region and the Province.	• Y • Suggest completing an exercise to specify and document more detailed service standards, including setting standards for regular, cyclical by-law and policy renewal	At Standard	4	$743,400 (1%)
Engineering and Capital Delivery: Municipal engineering services, capital project delivery for engineering projects, subdivision development and site inspections, traffic and transportation analysis, and environmental initiatives.	• Y, ongoing work with other departments to establish service levels and Asset Management Plan	Mixed (At/Above Standard)	13	$1,661,700 (2%)

*A more detailed version of service levels can be found in the Corporate Service Inventory shared with this report.

**Current service performance is based on existing service levels. Some services lack comprehensive service levels and therefore, this assessment may not be fully reflective of the service experience of internal clients or external residents. Further efforts are required to develop and document detailed service levels.

b. Departmental Profile: Planning and Development (1 of 2)

Service Improvement Opportunities
Opportunity #19: Expand functionality and utilization of CRM system for Economic Development and Policy Planning.
Opportunity #20: Develop a Council-driven real-estate portfolio strategy.
Opportunity #21: In coordination with Community Services, explore the delivery of new business and community development services.

b. Improvement Opportunity: Planning and Development – EcDev & Policy (1 of 3)

Opportunity #19: Expand functionality and utilization of CRM system for Economic Development and Policy Planning.

Rationale & Description: Currently usage of the CRM system is limited to certain departments within Aurora (e.g., Access Aurora, Operations etc.). The Economic Development and Policy Planning Division can benefit from expanded functionality and use of Aurora's CRM system to allow for more effective tracking of communications with external stakeholders and streamline the internal communications and workflow.

- The municipality currently subscribes to a Microsoft Dynamics 365 for its CRM solution and intends to expand its use, as outlined in the Technology Strategic Plan. Aurora can also consider adopting the Signal 311 CRM and Citizen Engagement solution, as endorsed by AMO (see Leading Practice below).

- Expansion of the CRM should align to the Customer Experience Plan (CEP) and internal Service Level Agreements (SLAs) to ensure the CRM is adopted as an enterprise-wide solution.

Revenues/Cost Savings	Level of Investment	Change Impact Assessment		Leading Practice/Benchmarking
Cost-savings: Productivity savings of $55,000 per year from *Digitization.*	Existing Technology Strategic Plan.	Service Delivery	M	Frequency Foundry is a Microsoft Gold Cloud CRM Partner and exclusively offers the Signal 311 CRM and Citizen Engagement solution to the Association of Municipalities Ontario's (AMO) members at a preferred price. The solution is built on top of the Microsoft Dynamics 365 platform. Key services offered: citizen self-service portal, work order management, multi-channel contact centre, among more. More details here.
Risks/Challenges		Processes	H	
Solely expanding functionality will not drive process change. Change management best practices should be applied to achieve desired outcomes. Additionally, expectations around CRM usage can be incorporated as part of the enterprise-wide initiatives to develop internal service level agreements.		Org Structure	L	
		Technology	H	
	Timing	Data and Reporting	H	
	Wave 3.	People and Culture	M	
		Overall	**H**	

b. Improvement Opportunity: Planning and Development – EcDev & Policy (2 of 3)

Opportunity #20: Develop a Council-driven real-estate portfolio strategy.

Rationale & Description: Council has prioritized development in the downtown area, but the Economic Development and Planning Division can benefit from a more fulsome real estate strategy and direction from Council.

- A strategy or guiding policy can provide the Division with a criteria by which to evaluate potential real estate projects and bring forward proposals to Council that are more aligned to Council's vision.

Revenues/Cost Savings

- Revenues: To be determined by real-estate portfolio strategy.
- Cost Savings: Productivity savings of $27,500 per year from *Standardizing Processes.*

Risks/Challenges

Many of Aurora's comparators do not have a real estate strategy, indicating that it may not be an essential planning process to prioritize. Of the comparators, only Ajax has identified developing a real estate strategy in their strategic plan for 2021. Aurora can consider initially developing a policy as this may be more cost-effective.

Level of Investment

5-10% (or 2-5 weeks) of Manager, EcDev & Policy Planning capacity to drive strategy development ($6,200 to $12,400).

Timing

Wave 3.

Change Impact Assessment

Service Delivery	L
Processes	M
Org Structure	L
Technology	L
Data and Reporting	L
People and Culture	M
Overall	L

Leading Practice/Benchmarking

- The City of Toronto adopted a City-Wide Real Estate Strategy in 2019 and identifies key factors such as vision, value creation, and strategic opportunities that can support decision-making (see here). Aurora can look to this and other best practices to develop its real-estate portfolio strategy.
- The City of Hamilton also has a Real Property Management function that includes real estate strategy and portfolio planning services (see here).

b. Improvement Opportunity: Planning and Development – EcDev & Policy (3 of 3)

Opportunity #21: In coordination with Community Services, explore the delivery of new business and community development services.

Rationale & Description: Both the Economic Development & Policy Planning Division and Recreation Division identified opportunities to support local businesses and community organizations with value-added business and workforce development services. These can further enhance economic and community development.
- Examples of services for the business community: drop-in business consultation sessions; business events; workforce training; workforce development programs; open data collections for businesses; a true concierge service for businesses; a formalized Business Retention and Expansion program etc.
- Examples of services for the not-for-profit community: helping them with grant writing, establishing governance, accessing basic tools for running a NFP, marketing and social media etc. This can help community organizations become more financially independent.
- These can be explored through developing an internal business case that considers various service delivery models, such as directly delivering these programs or partnering or contracting third-party local organizations that already provide similar services to the community.

Revenues/Cost Savings
Revenues: To be determined by business case.

Risks/Challenges
Aurora currently partners with the York Small Business Enterprise Centre (YSBEC) that offers similar services to the N6. Aurora should ensure that any new services are not duplicating YSBEC's offerings. There may be opportunity to expand the partnership with YSBEC to deliver additional services to citizens.

Level of Investment
5-10% (or 2-5 weeks) of Manager, EcDev & Policy Planning and Manager, Recreation capacity to develop business case ($15,200 to $30,400).

Timing
Wave 3.

Change Impact Assessment	
Service Delivery	M
Processes	H
Org Structure	L
Technology	L
Data and Reporting	M
People and Culture	M
Overall	M

Leading Practice/Benchmarking
The Town of Collingwood's Business Development Centre offers networking and education events and free business development advice to businesses. Some services are delivered by the Town itself, while some education events are delivered through partners like ventureLAB. More information here.

Continuous Improvement – Leading Practice Opportunities

CASE STUDIES of proposed initiatives that the Town may consider as part of broader efforts to modernize and continuously improve. While they are not directly linked to a service, they provide the organizational infrastructure to improve service delivery.

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b. Leading Municipal Practice Opportunities (1 of 3)

1. Corporate Strategic Plan Alignment	**Drive greater alignment between the corporate strategic plan and Division-level priorities.** Aurora has a new corporate strategic plan underway, but Town Divisions have varying levels of understanding on how their service line fits within the overall Town strategy. Some are confident of how their work is advancing the Town's long-term vision, while others can benefit from more direction from Council and leadership on where they should focus their efforts over the next 3-5 years. There is overall appreciation for new initiatives and efforts to modernize the municipality, but this can be balanced with discussions on prioritization and how new initiatives link to the overall Town strategy. There is opportunity for the CAO and Directors to lead discussions with Divisions on what the new strategy means for their service and collaboratively brainstorm Division-level priorities to deliver upon the strategy.
2. Cross-Functional Collaboration	**Build more collaborative partnerships between cross-functional support staff and service delivery staff.** Functional resources, such as communications, corporate services, and finance staff, are shifting to an internal service delivery model whereby functional resources are responsible for supporting a given service department or division. However, more efforts are required to foster a collaborative partnership between both groups and bolster the view of functional staff as strategic business partners. This will allow for consistency and better integration of functional staff into service delivery areas. Adoption of new tools through the ERP and Procurement Modernization project will play a key role in facilitating strategic partnerships. • For example, Financial Management can provide modeling services to Divisions to understand resource requirements needed to keep up with growth.
3. Governance Training	**Create an annual governance training plan for Council.** While there is an onboarding process in place, it is best practice for Council to also undergo annual training. Corporate Services, in collaboration with the Office of the CAO, has an opportunity to develop an annual governance training plan that supports Councillors in their decision-making role and provides ongoing education on relevant topics.

b. Leading Municipal Practice Opportunities (2 of 3)

4. Diversity and Inclusion	**Increase focus on diversity and inclusion within service delivery to better reflect the Town's changing demographics.**

As Aurora grows, its population is becoming more diverse and has changing needs and preferences. Diversity and inclusion should be an important consideration in service delivery – from expanding and diversifying the services that are offered (e.g., recreation and culture) to the customer service training Aurora provides to front-line staff. This can be achieved through tactics such as an Equity, Diversity, and Inclusion Committee. This will help ensure efforts are coordinated and Council-endorsed, rather than reactive. There are further opportunities to engage and amplify the work of community partners, who already undertake diversity and inclusion programming for their respective community groups. The proposed EDI Committee can be leveraged for this type of community engagement.

5. Capacity Management	**Appropriately resource enterprise-wide initiatives, while defining and communicating clear roles and responsibilities.**

A significant number of enterprise-wide initiatives are underway, most of which are managed by the Corporate Initiatives division in a project matrix environment. Front-line or administrative staff are often pulled into these projects, which directly impacts their capacity to deliver on a given service. On the other hand, if they are not able to support these projects, it adds pressure on the Corporate Initiatives division to manage and deliver on the project. There is opportunity to ensure the organization has capacity to sustain the level of enterprise-wide continuous improvement initiatives underway. This involves considering resourcing requirements and change management to ensure organizational buy-in and support. Among the comparators, there is a Director-level role and supporting FTE assigned to this type of department/division. The PMO function is also usually integrated with a Corporate Services function. Additionally, there is opportunity for more discussion and clarity on how to best manage staff capacity so they can balance assigned duties with special projects within other departments.

Comparator	Resourcing for Similar Types of Corporate Initiatives/PMO Teams
Aurora	Manager of Corporate Initiatives and Project Manager, PMO
Newmarket	Director of Innovations & Strategic Initiatives and 2 FTE
Caledon	Director of Corporate Strategy & Innovation and 7 FTE (dedicated to PMO)
Halton Hills	Director of Strategic Initiatives and a Senior Advisor, Strategic Initiatives

b. Leading Municipal Practice Opportunities (3 of 3)

6. Intranet	**Improve the intranet and increase its use to facilitate greater information sharing across departments.** Participants referenced the need to centralize departmental information, so it is easily accessible and shared across the organization (e.g., creating articles on services each department provides, posting internal contacts, documenting corporate knowledge to address FAQ). This can further support cross-functional collaboration within the organization.
7. Pandemic Practices	**Formalize and sustain practices put in place during the pandemic that proved to be effective.** Some practices adopted during COVID-19 should continue and be formalized if deemed appropriate. See below for examples of practices:

- **The option to work remotely** was the most popular COVID-19 practice that Town staff would like to see continued. See Innovation Opportunity #5 for best practices related to Accommodating Hybrid Work.
- **E-signatures** was emphasized as a key improvement made during COVID-19. There is opportunity to formalize signature validation, which would save the Financial Reporting & Revenue Division the extra time it takes to validate the signatures.
- **Digitizing records and documents** through Laserfiche has improved workflow, but there are opportunities to provide more training to increase effective use of the platform.
- **Digital submissions** for building permit issuance and planning applications have relieved paperwork and improved workflow. Building Inspectors also started doing inspections virtually, using cameras. These efficiencies can continue post-pandemic to reduce travel time and protect the health of field staff.

- The Financial Reporting & Revenue team shifted their focus to processing COVID-19 relief grants and subsidies, but over time this became too resource-intensive. For future financial emergencies, there should be a plan to address unexpected surge capacity (e.g., seeking contracted support).
- The upcoming Business Continuity Management program can help capture lessons learned from COVID-19. Furthermore, industry standard implementation of a business continuity management plan can support service modernization. For best practices, A 2021 study of pandemic planning in Canada found that the City of Toronto's Pandemic Influenza Plan did a good job of assigning roles and responsibilities to partners during a pandemic. In 2020, the City of Toronto further developed a Pandemic Planning Guide for Community Agencies.

Additional Source: Genest et al. (2021). *Translating COVID-19 emergency plans into policy: A comparative analysis of three Canadian provinces, p. 123,* https://www.tandfonline.com/doi/pdf/10.1080/25741292.2020.1868123?needAccess=true

Continuous Improvement – Innovation Opportunities

CASE STUDIES of initiatives that Aurora can further explore to position the municipality as a leader in modernization and innovation.

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b. Innovation Opportunities

The COVID-19 pandemic has changed social norms, working arrangements, and the needs and preferences of residents. Reliable digital infrastructure has become increasingly important for economic productivity, and remote working arrangements have given people more freedom to move from Toronto to surrounding communities, like those in York Region.

The best post-COVID opportunities for innovation address **changing resident needs and preferences** to accommodate growth, retain **changes to services and ways-of-working** that have been identified as improvements, and explore **digital transformation and investments** more vigorously. Below is a sample of opportunities and trends relevant to this changing landscape that Aurora can consider for further exploration. Details on each of these are included in the subsequent slides.

Resident and Business Needs and Preferences	Improved Services and New Ways-of-Working	Digital Transformation and Investments
• Accessible Public Wi-Fi • "Open Streets" initiatives • Climate Adaptation Planning • Participatory Budgeting	• Accommodating Hybrid Work • "Third Spaces" initiatives	• Digital Services and Payments • Open Data • "Smart Cities" Investments • Digital Engagement

b. Innovation Opportunities: Resident Needs and Preferences

1. Accessible Public Wi-Fi	2. Open Streets	3. Climate Adaptation Planning	4. Participatory Budgeting
Mayor Mrakas and Town Council recently approved a motion calling for the Town to "investigate existing models of municipally-implemented Wi-Fi services to develop a proposed model for Aurora." This should continue. Accessible public Wi-Fi is one way for the Town to increase digital inclusion and establish infrastructure required for future "smart" improvements.	Municipalities have converted roads into walkable, pedestrian-friendly spaces during the pandemic. The City of Toronto has run multiple "ActiveTO" or "Open Streets" initiatives, which closed "major roads for active transportation, expanding the cycling network and quiet streets." In Germany, one district closed 30 streets to create temporary "play streets" for children during the pandemic.	In September 2020, the Town of Halton Hills published its climate change adaptation plan to "minimize the negative impacts of climate change, as well as take advantage of opportunities to strengthen the Town's resilience to climate change." As residents become increasingly attentive to climate risks, municipalities have an opportunity to take the lead on adapting to these risks and reduce the impact of climate change on municipal services.	The City of Toronto piloted a "participatory budgeting" (PB) process which "is distinct from other budget consultations and specifically refers to a method that invites the public to propose ideas, vote and have the final say on how a portion of a government's budget will be allocated." PB is an innovative way to get residents directly involved in important Town decision-making, and the Town of Aurora could learn from Toronto's pilot.

Sources:
Town of Aurora (2021). *Council Meeting Minutes, May 25* https://pub-auroraon.escribemeetings.com/FileStream.ashx?DocumentId=2664.
City of Toronto (2021). *COVID-19: ActiveTO* https://www.toronto.ca/home/covid-19/covid-19-protect-yourself-others/covid-19-reduce-virus-spread/covid-19-activeto/.
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Town of Halton Hills (2020). *Climate Change Adaptation Plan* https://www.haltonhills.ca/en/residents/resources/Documents/HH%20CCAP%202020%20-%20AODA%20Sept16.pdf.
City of Toronto (2019). *Toronto's Participatory Budgeting Pilot Evaluation* https://www.toronto.ca/legdocs/mmis/2019/bu/bgrd/backgroundfile-124370.pdf.

b. Innovation Opportunities: Improved Services and New Ways-of-Working

5. Accommodating Hybrid Work

In May 2021, KPMG published research indicating that over 70% of Canadians believed that hybrid work models "should be a standard." In this same survey, over 80% of Canadians worried that "their bosses aren't prepared nor equipped to manage hybrid workplace models." Municipalities can take the lead in facilitating accommodating and innovative work arrangements for their employees, which other local businesses can model.

When asked about COVID-19 practices that they would like to see continued post-pandemic, remote work emerged as top of mind for Divisions. Many would still like the option to come into the office or need to due to the nature of their work, and therefore Aurora should explore a flexible hybrid model of working for Town staff.

6. "Third Spaces"

A "third space" is a location other than a person's home or place of employment. According to research conducted by Accenture Canada in May 2021, 69% of Canadians and 77% of Torontonians, who will continue to telecommute following the pandemic, would like to occasionally work from a "third space." Municipalities may look to encourage the creation of "third spaces" to accommodate new working arrangements.

For example, third spaces might include traditional public gathering places like parks, libraries, cafes, and restaurants equipped with new and innovative infrastructure to accommodate short-term working arrangements. New infrastructure could include accessible WIFI, enhanced power access, access to office supplies, and dedicated quiet and meeting spaces.

Sources:
KPMG (2021). *Canadians Like Hybrid Model Concept: Workplace Reboot* https://home.kpmg/ca/en/home/media/press-releases/2021/05/canadians-like-hybrid-model-concept-workplace-reboot.html.
Accenture (2021). *COVID-19 Has Sparked a New Wave of Innovation Across Consumer Industries in Canada* https://www.accenture.com/ca-en/about/newsroom/company-news-release-covid-consumer-research-2021.
World Economic Forum (2021) *What is a 'third space' venue - and could it be the future of hybrid working?* https://www.weforum.org/agenda/2021/07/third-space-remote-hybrid-working/

b. Innovation Opportunities: Digital Transformation and Investments (1 of 2)

7. Digital Services and Payments	8. Open Data	9. Digital Engagement
Digitization and technology can increase accessibility and ease-of-access to municipal services. A mobile-friendly website capable of processing payments for services typically processed in-person can reduce administrative costs, improve access, and result in higher customer satisfaction. Oakville, for example, uses an online portal where residents sign-in to an account to access Town services.	Governments can build trust with residents by making the data it collects publicly accessible. The COVID-19 pandemic proved the value of open data, allowing Canadians and Ontarians to access updated information on COVID-19 cases and vaccine progress daily. As the Town develops better service levels and KPIs, this information could be made available publicly to residents in an accessible format. Municipalities across Canada, including York Region, have already adopted Open Data/Government processes.	In March 2021, the Canadian Municipal Barometer published research which found that municipal representatives across the country increasingly hold meetings online to engage with constituents. Pre-pandemic, under 20% of representatives were using online meetings for engagement. During the pandemic, this has grown to 85% for online public meetings and over 60% for online private meetings. Online engagement can be more accessible for residents who cannot participate in traditional engagements like town hall meetings. This is an opportunity to capture residents' willingness to use online tools for engagement.

Sources:
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Government of Canada (2020). *Open Government Across Canada* https://open.canada.ca/en/maps/open-data-Canada.
York Region (2020). *Open Data* https://www.york.ca/opendata
Laura Conrad & the Canadian Municipal Barometer (2021). *Citizen Engagement in a Pandemic: Data from the CMB Annual Survey* http://www.cmb-bmc.ca/2021/03/11/citizen-engagement-in-a-pandemic-data-from-the-cmb-annual-survey/

b. Innovation Opportunities: Digital Transformation and Investments (2 of 2)

10. Comparator Municipality Smart Cities Submissions

The Government of Canada ran a "**Smart Cities Challenge**" and invited applications from municipalities across the country. Below are submissions from two comparators: Caledon and Halton Hills. These proposals were not successful, but they represent the ambition of municipalities like the Town of Aurora.

Caledon – "Smart Spaces"

Connecting Caledon aims to find ways to connect Caledon residents to digital technology, each other, and the world through Smart Spaces. Through this project, we believe that Caledon can be an example for other rural communities on how to connect and thrive using smart technology. Our proposal is to:

- Increase the number of traditional and non-traditional spaces where the community can connect.
- Collect data on how our community is using these spaces.
- Use the data collected to continue to improve community spaces to meet our residents' needs in the future. We will do this by creating three types of Smart Spaces.
1. A "hub" which hosts co-working space for entrepreneurs, while still providing community space for residents.
2. "Spokes" located in a number of our villages and hamlets in community spaces that allow people access to resources at the "hub" in their local community, tailored for their local needs.
3. Outdoor spaces in our parks and trails that use smart lightning, signage and benches to provide connectivity while enjoying Caledon's natural beauty. The application will create improved economic opportunities through co-working space for small businesses, entrepreneurs and local start-ups, and empower our community to help space their community spaces to best meet their uses.

Halton Hills – "Electric Vehicle Charging Stations"

The App-Connected Level 2/3 V2G Enabled Electric Vehicle Charging Station Project involves:

- Developing a vehicle charging station that is connected to an app so users can find an available station, pay for parking, pay to charge their car, and get notified when charging is done.
- Developing a smart phone application for Android and iPhone.
- Building and installing 200 charging stations throughout Halton Hills.
- Beta-testing the system and monitoring performance.
- Understanding potential market opportunities for the charging stations.
- Wide-scale commercialization.

Sources: Infrastructure Canada. *Smart Cities Challenge: Participating Communities* https://www.infrastructure.gc.ca/sc-vi/map-applications.php

Growth Impact Analysis

c. Growth Impact Analysis: Overview of Findings

A key output of this service delivery review is to assess population growth projections and how they will impact service delivery. The following summarizes key findings from the growth impact analysis and uses a heat map to illustrate the financial, organizational, and risk impact assessments for each service category. A detailed analysis is outlined in the following slides.

Growth will require Aurora to continuously modernize and digitize operations to achieve cost-efficiencies, with particular emphasis on IT and HR as automation and changing workforce needs impact the **future of government**.

Aurora's ability to service **water and wastewater** needs for the planned growth targets are highly dependent on the Water Reclamation Centre currently scheduled for completion in 2028, which has yet to be authorized by the Government of Ontario.

An aging and increasingly diverse population, higher density development, ability to develop and service new facilities, and citizen preferences will require Aurora to continuously innovate **recreation and culture services.**

Aurora's fiscal strategy will need to pay particular focus to delays in **development charge (DC) collections** and their impact on future debt requirements and DC rates.

As identified in the **recent Master Transportation Study**, Aurora should focus on managing the existing transportation network while improving connectivity and safety particularly for pedestrians and cyclists.

To accommodate growth, Building Services will need to strengthen organizational capabilities to service new types of development.

IMPACT ASSESSMENT HEAT MAP

LEGEND*

Low risk   Medium risk   High risk

*Size of the bubble indicates degree of risk. Colour is used for visual emphasis.

Financial Impact (L,M,H)

Protection Services   Environmental Services

Recreation & Culture Services

Planning and Development

General Government   Transportation Services

Organizational Capability Impact (L, M, H)
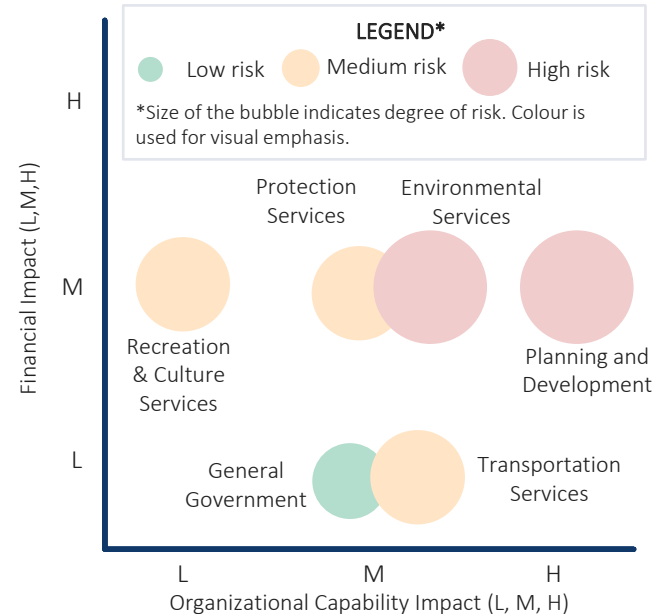
c. Growth Impact Analysis Methodology: Overview

The following outlines StrategyCorp's approach to conducting the growth impact analysis. The analysis is intended to provide insights that are most useful for Aurora in planning for future service delivery as opposed to standard growth management work. Growth management is a long-term and resource-intensive undertaking and is already underway through implementation of the new fiscal strategy and the Official Plan renewal.

Municipal Growth Impact Analysis Methodology			

Inquiry	What does population growth look like?	What drives growth in services?	What does growth look like for services?	How can the municipality prepare for growth?
Approach	**Define scenarios for population growth:**	**Assess service growth drivers to identify comparators:**	**Forecast service growth by:**	**Assess organizational readiness for service growth:**
	1. Slow Growth 2. As Projected 3. Expedited Growth	A combination of population, organizational maturity, and development will drive cost of service delivery. These drivers informed comparators for each population growth scenario.	1. Identifying common FIR service categories across comparators. 2. Benchmarking cost of service delivery and staff complement against each comparator.	

This analysis will serve as an input to existing work, and more efforts will be required to bring together the various pieces of internal work.

c. Growth Impact Analysis Methodology: Scenario Development

York region's ongoing municipal comprehensive review (MCR) provides forecast allocations for Aurora. It anticipates that Aurora's population will grow to 84,900 by 2051. For the purposes of this analysis, 62,000 was used as the base or current state population for Aurora. Therefore, the MCR forecast allocations represent an approximate 37% (or ~22,900) increase in population.

The Town of Aurora released a Growth Management Discussion Paper in April 2021, as part of its Official Plan Review. The document explores how, where, and in what form growth could occur within the Town over the next 30 years. It estimates that the Town can accommodate an additional 22,250 to 25,250 residents, and approximately 11,700 jobs by 2051, thereby achieving the York Region MCR forecasts. Based on the expected population growth, three potential scenarios were developed for how the growth will change Aurora's population density and development pattern, distribution, and demographics.

① At Projected Growth	② Slow Growth	③ Expedited Growth
Assume Aurora will **meet** population and intensification targets outlined in the York Region MCR.	Assume growth will be **lower** than forecasted (an assumption of 10% lower was made).	Assume growth rates are **much higher** than forecasted (an assumption of 10% greater was made).

A population growth rate (over 30 years and yearover-year) and population density were calculated for each of the scenarios.

Scenario	Slow Growth (below MCR target)	At Projected Growth (at MCR target)	Expedited Growth (above MCR target)
Pop Growth Rate	27% (62,000 to 78,740)	37% (62,000 to 84,900)	47% (62,000 to 91,1140)
Annual Pop Growth Rate	0.9%	1.2%	1.6%
Pop Density	1,579.53/square km	1703.11/square km	1,828.28/square km

c. Growth Impact Analysis Methodology: Growth Drivers and Comparator Selection

The cost-of-service delivery will be impacted by the following three growth drivers. These drivers affect service demand, and in some cases, will also affect each other:

Population will drive development *and* organization growth | Development can also drive organization growth

Population → **Development** → **Organization**

| As the number of residents increase, demand for services increases (e.g., more by-law complaints). | Aurora's 45% intensification target will require development in the Built Up Area (BUA) and Designated Greenfield Area (DGA). | As the municipal tax base increases and services must be scaled, the organization matures and modernizes to adapt to its new size (e.g., more digitization). |

Comparable municipalities were selected and evaluated based on key indicators related to these drivers. They are outlined below.

Scenario	Slow Growth (below MCR target)	At Projected Growth (at MCR target)	Expedited Growth (above MCR target)
Aurora Pop Growth Rate	27% (62,000 to 78,740)	37% (62,000 to 84,900)	47% (62,000 to 91,140)
Aurora Annual Pop Growth Rate	0.9%	1.2%	1.6%
Aurora Population Density	1,579.53/square km	1703.11/square km	1,828.28/square km
Aurora Median Family Income	N/A (currently $120,795)		
Comparator	Town of Caledon	Town of Newmarket	Town of Milton
Comparator Government Type	Lower-tier in a region		
Comparator Pop [1]	74,649	90,156	123,200
Comparator Annual Pop Growth (past 5 yrs.) [1]	1.47%	1.03%	4.46%
Comparator Population Density [1,2]	101.1/square km*	2,344.76/square km	339.19/square km
Comparator Median Family Income [2]	$121,673	$109,004	$104,730

*While Caledon is much larger in geography than Aurora, only 20% of Caledon's land mass can be developed as the rest of it is protected land. Therefore, the population density on developable land would be more comparable to that of Aurora.

1 Source: FIR data, 2015-2019
2 Source: Statistics Canada, Census 2016

c. Growth Impact Analysis Methodology: Forecasting and Analysis

The following table outlines how the impact to service delivery was assessed.

Assumptions for Calculating Growth	Impact Analysis		
	Scale of Financial Impact	Scale of Organizational Capability Impact	Risk Level
Benchmark cost of service delivery and staff complement for each relevant FIR service category against existing municipalities that face comparable circumstances to the scenarios for what Aurora will look like in 2051.	**Low:** Municipality can likely maintain service levels through expected growth in existing revenue sources. **Medium:** Municipality can likely maintain service levels through expected revenue growth, supplemented by other sources of revenue, such as reserves. **High:** Municipality cannot likely maintain or improve service levels without significant increases in additional sources of revenues.	**Low:** Organizational capability exists and can be continuously improved/modernized to maintain effective service levels. **Medium:** Organizational capability exists but will require large-scale changes to maintain effective service levels. **High:** Organizational capability is missing and will require greater investments to maintain effective service levels.	**Low:** Growth poses low risk to municipality operations. **Medium:** Growth poses medium risk to municipality operations but can be mitigated. **High:** Growth poses high-risk to municipality operations and requires leadership oversight.

The analysis also includes qualitative insights to highlight additional considerations for assumptions, such as external factors, level of water/wastewater infrastructure investment needed, risks associated with scenario etc.

c. Growth Impact Analysis Methodology: Data Sources and Limitations

Below is an overview of the data sources that informed the analysis. Limitations in the data and overall analysis are also outlined.

Data	Limitations	Key Sources
Population growth, density, and demographics	• The York Region Forecast and Lands Need Assessment is the best and most recent data available. It must be used for planning efforts and the forecasts also account for recent trends and future policy shifts. The SDR RFP documents mention 2042, but the York Region forecast allocations extend to 2051. Projections to 2051 are preferable due to available data. • The analysis focuses on the potential financial impact of growth on service delivery and is designed to enable future analysis by municipal leadership. This reflects that **some dimensions of future service delivery cannot be known and must be assessed and refined in the future**. As a result, this analysis identifies reasonable growth drivers given limitations in data and future planning.	• York Region Proposed 2051 Forecast and Lands Need Assessment • 2016 Canadian Census (Statistics Canada) • MMAH FIR data
Development and population distribution	• **The Town of Aurora's Official Plan is under development and will not be finalized in time for this analysis.** This limits the level of analysis available on how high-density intensification versus low density greenfield development impacts service delivery. To mitigate this, SCI has leveraged the Growth Management Discussion Paper published by Aurora in 2021, engage with Aurora leads on the Official Plan and consult in-house with subject-matter experts.	• Aurora Official Plan/Growth Management Discussion Paper • SME engagement
Finances	• Aurora's internal financial data is the most recent and accurate information available. However, **FIR data is the best resource for comparable data across peers**. Since not all municipalities organize services in the same way, MMAH classifies municipal services into nine functions. However, comparators have almost certainly not reported services in consistent categories. The classification guidelines were used to identify the service functions most relevant for Aurora's services. Benchmarking was then done across the FIR service functions. (see next slide) • 2019 FIR data was used as it is the most recent set across all comparators and isn't impacted by COVID-19.	• FIR data

Other Assumptions: This model is fixed to Aurora and does not account for pressure on Aurora to increase or limit services based on growth in nearby regions.

c. Growth Impact Analysis Methodology: FIR Service Categories

FIR data was used to benchmark Aurora against comparators. Not all municipalities organize services in the same way. For FIR purposes, MMAH classifies municipal services into nine functions. The classification guidelines were used to organize Aurora's services into one of the nine functions. Benchmarking was then done across these FIR service categories.

FIR Service Categories	General Government		Environmental Services	Transportation	Protection Services	Planning and Development	Recreation and Culture Services
Aurora Services	• Corporate Communications • Human Resources • Legal Services • Legislative Services/Records Management • IT • Corporate Initiatives • PMO	• Financial Reporting & Revenue • Financial Management • Procurement Services • Fleet • Facilities Management • By-law • Access Aurora	• Water, Wastewater, Stormwater • Solid Waste	• Roads	• Building	• Development Planning • Policy Planning & Economic Development • Engineering and Capital Delivery	• Parks • Recreation/ Special Events • Business Support • Culture

Data limitation: There is a possibility that FIR data submitted by Aurora and comparators may not be entirely aligned to these guidelines because internal budgets are structured differently, there are reporting errors, etc. Therefore, data should be considered directional in nature.

c. Growth Impact Analysis: General Government

Growth Metric	Comparator				Impact Assessment (H/M/L)		
	Aurora	Caledon	Newmarket	Milton	Financial	Organizational Capability	Risk
OpEx (000s)	12,609	10,843	5,270	8,175			
% Change in OpEx (%)	-	-14%	-58%	-35%			
FT Municipal Workforce	81	99	117	88	L	M	L
PT Municipal Workforce	-	1	31	7			
Seasonal Municipal Workforce	-	2	4	-			

Assume inclusive of:
- Corporate Communications
- Human Resources
- Legal Services
- Legislative Services/Records Management
- IT
- Corporate Initiatives
- PMO
- Financial Reporting & Revenue
- Financial Management
- Procurement Services
- Fleet
- Facilities Management
- By-law
- Access Aurora

- Currently, Aurora spends more than comparators do on General Government. While this can be attributed to FIR reporting differences (e.g., other municipalities may not include by-law in General Government), the overall takeaway is that Aurora's General Government expenses are unlikely to increase at the same rate as population growth.

- Town growth will not have a significant financial impact on General Government expenses over the long-term and Aurora can likely finance growth through expected increases in existing revenue sources (e.g., tax base, user charges etc.). A moderate increase in FTE is expected, based on comparator analysis.

- However, in the short-term, automation and changing workforce needs are likely to require Aurora to invest more in IT (i.e., more digital infrastructure) and HR (i.e., upskilling and reskilling, cross-training, remote work accommodations). Efforts like participating in the current N6 future of work research study should continue to be prioritized. These will create short-term financial pressures as implementation must occur before benefits are realized.

- It will be important for Aurora to continuously modernize and digitize operations to achieve cost-efficiencies. Given the Town is applying for Excellence Canada's Gold level certification, it is in a strong position to build the necessary organizational capabilities to accommodate growth.

c. Growth Impact Analysis: Environmental Services

Growth Metric	Comparator				Impact Assessment (H/M/L)		
	Aurora	Caledon	Newmarket	Milton	Financial	Organizational Capability	Risk
OpEx (000s)	33,867	880	48,648	3,515	M	M	H
% Change in OpEx (%)	-	-97%	44%	-90%			
FT Municipal Workforce*	31	64	60	73			
PT Municipal Workforce*	-	2	11	6			
Seasonal Municipal Workforce*	-	60	41	12			

Assume inclusive of: Water, Wastewater, Stormwater, Solid Waste

*Reported as "Public Works" workforce in FIR data

- Newmarket's operating expenditures for Environmental Services are more comparable for Aurora on a per capita basis and demonstrate that Aurora can expect this area to grow in correlation with population growth.

- Notably, Aurora has a significantly lower staff count for this service area. This may be attributed to FIR reporting errors or a high dependency on outsourcing services at Aurora. As identified in the opportunity analysis, Aurora can benefit from regularly scheduled reviews of contracted services to ensure that market competitive opportunities are being optimized and continue to provide better value than in-house delivery options. These reviews should consider growth implications and if growth can be better serviced in-house.

- There is a risk that Aurora may not be able to sufficiently provide water and wastewater servicing for the planned growth targets. A key factor in addressing this risk will be the Water Reclamation Centre currently scheduled for completion in 2028. This Centre is expected to provide capacity for 90,000 people in East Gwillimbury and Northwest Newmarket while also freeing up capacity for growth in the rest of Newmarket and Aurora.

c. Growth Impact Analysis: Recreation & Culture Services

Growth Metric	Comparator				Impact Assessment (H/M/L)		
	Aurora	Caledon	Newmarket	Milton	Financial	Organizational Capability	Risk
OpEx (000s)	24,834	23,823	41,044	41,890	L	M	M
% Change in OpEx (%)	-	-4%	65%	69%			
FT Municipal Workforce	80	74	76	93			
PT Municipal Workforce	-	1	71	583			
Seasonal Municipal Workforce	-	137	554	237			

Assume inclusive of: Parks, Recreation/ Special Events, Business Support, Culture

- While Caledon is an outlier in terms of Recreation & Culture Services spending, Newmarket's and Milton's operating expenditures and workforce profile demonstrate that Aurora can expect growth in this area. Growth is expected to be primarily population-driven, driving increase in demand and revenue (i.e., user fees) and development-driven (i.e., availability of facilities for programming).
- The following factors are expected to shape growth:
  o From a **demographic perspective**, Ontario's population projections indicate that 22% to 27% of York region's population is expected to be seniors in 2046, representing a growth of over 80%. In contrast, growth in the number of children is forecasted to be between 20% to 30%. Services catered to the aging population will need to be prioritized in growth planning. Furthermore, increasing provincial focus on cultural diversity and immigration patterns can accelerate the growth of culture services.
  o From a **development perspective**, most residential population growth is expected to be addressed through intensification. This will influence location of services and is expected to put increasing pressure on existing facilities. Limitations in developing and servicing new facilities can also slow down growth. As a result, the Town will need to consider innovative approaches to delivering services (e.g., virtual programming).
  o **Citizen preferences** are also expected to change as they seek greater opportunities to engage with their community (e.g., advances in remote working mean more young and middle-aged adults are at home and more likely to enroll in recreational programming).

c. Growth Impact Analysis: Planning and Development

Growth Metric	Comparator				Impact Assessment (H/M/L)		
	Aurora	Caledon	Newmarket	Milton	Financial	Organizational Capability	Risk
OpEx (000s)	2,283	7,138	3,550	7,861	H	M	H
% Change in OpEx (%)	-	213%	55%	244%			
FT Municipal Workforce	46	60	9	58			
PT Municipal Workforce	-	-	2	-			
Seasonal Municipal Workforce	-	2	1	2			

Assume inclusive of: Development Planning, Policy Planning & Economic Development, Engineering and Capital Delivery

- Newmarket's operating expenditures on Planning and Development are more comparable for Aurora on a per capita basis and demonstrate that Aurora can expect this service area to grow in correlation with population and development growth.

- Discrepancies in workforce profiles may be attributed to FIR reporting differences. However, it is more important for Aurora to consider the staff capabilities that will be required to service growth. There is opportunity to better align staff expertise with Aurora's development patterns (e.g., experience in infill/high-density development).

- The York region MCR highlights that the region, including Aurora, has been experiencing increasing delays in collecting development charges (DCs). A slower than forecasted rate of growth requires a fiscal strategy to mitigate the impacts of slower growth, which includes aligning infrastructure projects with actual growth and DC collections. Aurora is exploring this risk area further through its new fiscal strategy. In addition, it is best practice to provide Council with an annual report on the impacts of the delayed collection, including the impact on future debt requirements and future DC rates. This will further inform Council's decisions on the pace of growth. **Note**: this is being included in the budget annually.

c. Growth Impact Analysis: Transportation Services

Growth Metric	Comparator				Impact Assessment (H/M/L)		
	Aurora	Caledon	Newmarket	Milton	Financial	Organizational Capability	Risk
OpEx (000s)	11,016	25,468	14,570	45,643			
% Change in OpEx (%)	-	131%	32%	314%			
FT Municipal Workforce					M	L	M
PT Municipal Workforce		N/A*					
Seasonal Municipal Workforce							

Assume inclusive of: Roads

*Workforce profile for "Roads" not explicitly reported in FIR.

- Evidently, there are variations in how much comparators spend on Transportation Services. Milton's cost of service delivery is likely higher due to their transit services. There may also be FIR reporting differences across the comparators.

- In 2020, the Town of Aurora conducted a Master Transportation Study that did an in-depth analysis of how future growth will impact Transportation Services including Roads. The study recommended that the Town focus on managing the existing network while improving connectivity and safety, particularly for pedestrians and cyclists. Findings and recommendations from this study should be considered when planning future growth and updating the Asset Management Plan.

- The study suggested leveraging DC revenues to fund initiatives like Smart Commute Central York. As identified on the previous slide, Aurora is delayed in DC collection, which currently poses a financial risk to the Town. Further financial and risk analysis is required to understand how Aurora will resource development-driven growth.

c. Growth Impact Analysis: Protection Services

Growth Metric	Comparator				Impact Assessment (H/M/L)		
	Aurora	Caledon	Newmarket	Milton	Financial	Organizational Capability	Risk
OpEx (000s)	14,441	21,852	21,107	19,755			
% Change in OpEx (%)	-	51%	46%	37%			
FT Municipal Workforce	N/A*				M	M	M
PT Municipal Workforce							
Seasonal Municipal Workforce							

Assume inclusive of: Building

*Workforce profile for "Building" not explicitly reported in FIR.

- Comparators spend significantly higher than Aurora on Protection Services. This is most likely due to FIR reporting on Fire Services. The key finding is that the three comparators spend relatively similar amounts on Protection Services, suggesting costs are not highly sensitive to population changes.

- For Building Services, Aurora can expect growth to be more dependent on development. Increase in development will drive service growth and related revenue growth (e.g., licenses & permit fees). Aurora should also conduct further analysis on to what extent reserves will continue to be required to resource Building services.

- Increases in the number of residential, industrial, commercial, and institutional buildings will directly put a strain on building permit and inspection service levels. Additionally, higher-density buildings may present greater cost-efficiencies for staff travel but can require different systems and processes to keep up with new types of building. Therefore, Building Services will need to focus on strengthening organizational capabilities to service new types of development.

Additional Considerations

The COVID-19 pandemic directly impacted Building staff, as they could not physically conduct building inspections. To mitigate against future risks associated with public health measures, Aurora can adopt more digital solutions for conducting building inspections (e.g., use of cameras).

4. Implementation Considerations

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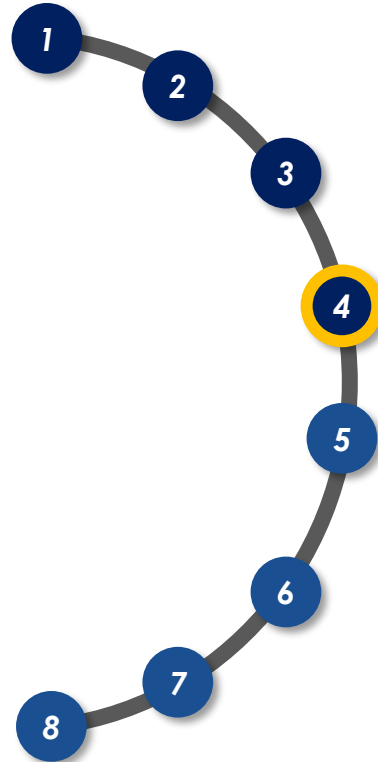
a. Timeline

a. Timeline

Below is a suggested implementation timeline for Aurora. Each opportunity has been prioritized by Wave, and each Wave is expected to span 1 to 2 years. Further operational planning and leadership prioritization will be required to align on specific timelines.

Opportunity	Wave 1	Wave 2	Wave 3
1. Missing service level development and annual update	───►		
2. SLA development	──────►		
3. Customer Services/Access Aurora integration	──────────►		
4. Value proposition communications to residents	──────────►		
5. Communications team transition to strategic activities	────────►		
6. Access Aurora capacity	───►		
7. Off-site wedding services	───►		
8. Legal Services SLA implementation	──────►		
9. HR Strategy development	──────►		
10. PMO role transition	──────►		
11. By-law resourcing assessment	───►		
12. Transition to an AMPS	──────►		
13. Contracted services review	──────────►		
14. Recreation front-line staff training	──────►		
15. Special Events Calendar Policy development	───►		
16. Facilities Management mandate and resource review	──────►		
17. Culture Services mandate and resource review	───►		
18. ROP application digitization and enforcement by-law	───►		
19. CRM expansion	──────────►		
20. Real Estate Portfolio Strategy development	──────────►		
21. Business and Community Development services	──────────►		

5. Appendix A: Town of Aurora Financial Assessment

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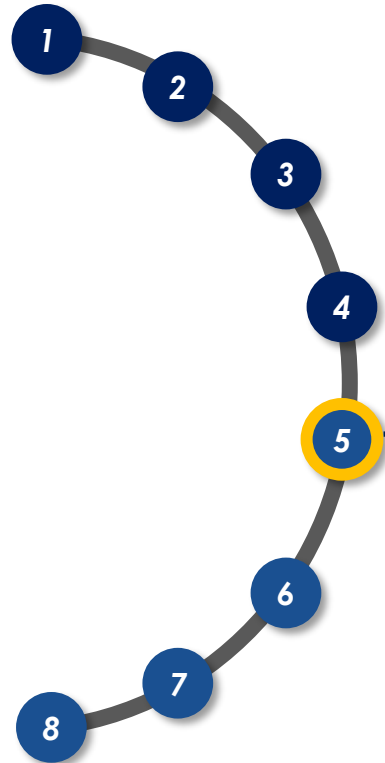
a. Introduction

b. Summary of Themes

c. Indicators and Trends

d. User Fees

a. Introduction & Data Limitations

StrategyCorp assessed Aurora's financial health according to several indicators taken from the Ministry of Municipal Affairs and Housing's Financial Information Return (FIR) data using the returns from 2010-2019. The following slides provide StrategyCorp's analysis of the findings. At the outset, it is important to acknowledge some limitations with the data:

- 2019 Data is the most recent data provided in FIR which can be used comparatively between selected municipalities.

- FIR data is reported by the municipalities themselves, and as such, its value for comparative purposes is limited due to variances in reporting consistency. FIR data also inappropriately characterizes some figures, skewing cost figures. StrategyCorp has indicated where this has impacted its analysis.

- FIR data reports total household and total population figures for each year of available data. StrategyCorp has used these figure in lieu of more detailed information on population and households across the smaller communities that comprise Aurora.

- Where possible, StrategyCorp has leveraged various reports, data, and information from primary and secondary sources (e.g., third-party organizations) available at the time this report was developed to inform the findings. StrategyCorp has not directly engaged any peer comparators to solicit information.

- The COVID-19 pandemic has taken a toll on municipalities everywhere. Where possible, StrategyCorp has sought to include and reflect how this has shaped current state analysis and points of comparison between municipalities. The true measure of the economic impact of the pandemic is uncertain.

b. Themes and Areas of Exploration

An analysis of Aurora's financial reporting points to six key findings:

Healthy Reserves

Aurora has significant reserves which outperform comparator municipalities. However, this is currently skewed by the hydro sale reserve, which is being spent on the Aurora Town Square and will reduce the Town's reserves.

Rising Debt Burden

Aurora's debt burden has increased over the past few years. However, this debt burden remains within sustainable levels. The Town's rising debt will be addressed through a debt management policy developed through the Fiscal Strategy.

Key Performance Measures

According to MMAH's KPIs, Aurora is in a healthy financial position, meeting 5/6 of the targets. However, the Town has not replaced existing assets quickly as demonstrated by its below-target Asset Sustainability Ratio.

Taxation

Aurora's tax rate has grown at a steady rate aligned with inflation. However, Town tax rates have grown more quickly than upper-tier taxes over the same period due to artificially low York Region tax rates in previous years.

Taxes Receivable

While property tax receivables have increased significantly over the period, tax rate increases and the ratio of tax to non-tax revenue has remained within acceptable limits.

Capital Expenditures

Capital expenditures in Aurora have decreased significantly over the last five years. However, the Town has an asset management plan which will guide capital expenditures into the future.

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c. Preliminary Indicators for Financial Sustainability

- The Town has significant reserves. However, these will decrease significantly following the completion of the Aurora Town Square.

- The Town has seen sharp drop in annual capital expenditures in recent years and has fluctuated since 2015, but recent facility builds will have a significant impact on capital spending performance in 2020/2021. The Town's asset management plan and capital plan will guide management of future capital investments.

- The Town's debt burden has grown substantially since 2015, but this figure remains within the Town's capacity to service the debt.

	2015	2016	2017	2018	2019	Average YoY
Total Municipal Property Taxes Per Household	4,593.41	4,477.87	4,486.31	4,746.14	4,984.57	1.7%
Total Property Taxes Per Household	6,424.15	6,228.86	6,234.51	6,560.06	6,848.96	1.3%
Annual Operating Expenditures	75,538,823.00	80,988,095.00	86,058,726.00	89,746,743.00	99,050,986.00	6.2%
Annual Operating Expenditures per Capita	1,344.11	1,460.69	1,358.57	1,404.60	1,574.74	3.4%
Annual Capital Expenditures	41,745,495.00	38,939,405.00	11,229,867.00	16,848,413.00	7,756,917.00	-16.3%
Annual Capital Expenditures per Household	2,325.01	2,009.15	544.43	803.91	367.63	-16.8%
Total Reserves	62,893,873.00	66,773,213.00	70,215,722.00	64,605,645.00	82,480,734.00	6.2%
Total Reserves per Household	3,502.86	3,445.29	3,404.07	3,082.62	3,909.04	2.3%
Total Municipal Debt Burden	2,577,139.00	5,485,446.00	4,968,177.00	9,694,735.00	8,654,243.00	47.2%
Municipal Debt Burden per Household	143.53	283.03	240.86	462.58	410.15	37.2%
Municipal Debt Burden per Capita	45.86	98.93	78.43	151.73	137.59	40.0%
Residential Assessment Percentage (incl. Multi-Res)	85.65%	86.52%	86.47%	86.70%	83.99%	-0.4%
Non-Residential Percentage Assessment	14.35%	13.48%	13.53%	13.30%	16.01%	2.3%

c. Revenues, Operating Expenses, Capital Expenses, and Reserves

- In recent years, Aurora has largely maintained municipal property taxes with adjustments healthily matching the rate of inflation.
- Taxes receivable have grown at a relatively high rate since 2015 at 8.9% YoY. However, this has kept pace with the growth of the Town's tax levy. Because of this, taxes receivable as a proportion of the total tax levy has mostly remained between 3%-4% between 2015-2019. Of note, the sharp increase in 2018 is also because the water tax account was then transferred to the property tax accounts.
- The Town experienced a significant decline in government transfers from 2018-2019. This was due to leftover gas tax funds which were not used for the Library Square project, and is therefore no cause for concern. Additionally, FIR recognizes deferred revenue based on cost of completion on capital asset. Therefore, the actual receipt of funds in 2019 was higher.

	2015	2016	2017	2018	2019	Average YoY
Taxes Receivable	$6,676,497	$5,455,285	$7,757,054	$10,653,079	$9,652,844	8.9%
Current Year Taxes Receivable as a % of Current Tax Levy	3.4%	2.6%	3.4%	4.2%	3.9%	3.2%
Accounts Receivable	$6,638,292	$7,421,195	$7,098,384	$6,735,779	$7,380,061	2.2%
Government Transfers	$3,619,801	$3,348,598	$3,391,234	$3,769,788	$1,756,287	-10.3%
Government Transfers as a % of Total Revenue	3.0%	2.7%	3.7%	4.1%	1.6%	-9.3%
Municipal Property Taxes per Household	$4,593	$4,478	$4,486	$4,746	$4,985	1.7%
Annual Operating Expenses per Household	$4,207	$4,179	$4,172	$4,282	$4,694	2.3%
Capital Expenditures as a % of Operating Expenditures	55%	48%	13%	19%	8%	-17.2%
Reserves as a % of Municipal Property Taxation	54%	55%	54%	47%	57%	1.1%
Total Reserves and Discretionary Reserves per Capita	$1,119	$1,204	$1,108	$1,011	$1,311	3.4%

c. MMAH's Key Performance Indicators

- The Town is within the target range for almost all of MMAH's Key Performance Indicators and is in a good financial position to invest in capital projects, service its debts, and raise revenues. The Town also has a large amount of new infrastructure which have yet to be fully consumed.

- The high watermark Operating Surplus Ratio years in 2015/2016 are likely due to fabricated PSAB revenue which came through development charges.

- The Asset Sustainability Ratio is below target, meaning that the Town may not sufficiently maintaining, replacing or renewing existing infrastructure.

	2015	2016	2017	2018	2019	Average YoY
Operating Surplus Ratio (Target 0% to 15%)	66.2%	60.2%	8.0%	2.9%	11.8%	-16.4%
This is an indicator of the extent to which revenues raised cover operational expenses only or are available for capital funding or other purposes. A negative ratio indicates the percentage increase in rates revenue that would have been required to achieve a break-even result. The basic target: 1% to 15%. Advanced target: >15%.						
Current Ratio (Target >=1)	1.09:1	0.86:1	1.05:1	1.57:1	1.24:1	
This is an approximate measure of a municipality's liquidity, or its ability to pay short-term obligations.						
Rates Coverage Ratio (Target >=40%)	88%	85%	84%	87%	80%	-1.7%
This is a measure of the municipality's ability to cover its costs through its own "rates" revenue efforts. Basic target: 40% to 60%. Intermediate target: 60% to 90%. Advanced target: >90%.						
Debt Service Coverage (Target >=2)	30	84	26	19	19	-7.4%
This is a measure of a municipality's ability to service its debt payments. The target is a ratio greater than or equal to 2.						
Asset Sustainability Ratio (Target >90%)	358%	281%	76%	113%	51%	-17.1%
This is an approximation of the extent to which a municipality is replacing, renewing or acquiring new assets as the existing infrastructure being managed by the municipality are reaching the end of their useful lives. The target ratio is >90% per year. A municipality which is not reaching this target is not sufficiently maintaining, replacing or renewing their existing infrastructure. This may result in a reduction in service levels and/or useful lives previously expected and will likely create a burden on future ratepayers.						
Asset Consumption (Target <50%)	28%	28%	30%	31%	33%	3.8%
This measures the age of a municipality's physical assets. It measures the extent to which depreciable assets have been consumed by comparing the amount of the assets that have been used up and their cost. (<25% - Relatively new infrastructure, 26% to 50% - Moderately new infrastructure, 51% to 75% - Moderately old infrastructure, >75% - old infrastructure)						

c. Debt Sustainability

- Indicators show the Town's debt burden climbing steadily from 2015 per household, as a % of operating revenues, and as a % of reserves and reserve funds.
- However, the Town is also able to adequately manage this debt. Debt charges as a percentage of the Annual Repayment Limit have remained relatively constant over the past 5 years. The YOY change in debt charges as a % of ARL is skewed by high debt charges prior to 2016.

	2015	2016	2017	2018	2019	Average YoY
Annual Repayment Limit *	$13,908,976	$15,490,019	$21,327,878	$23,127,742	$25,351,552	16.5%
Debt Charges as a % of ARL	13%	4%	4%	4%	5%	-12.3%
Municipal Debt Burden per Household	$144	$283	$241	$463	$410	37.2%
Debt Charges per Household	$104	$34	$38	$44	$62	-8.0%
Municipal Debt Burden as a % of Operating Revenues	2.2%	4.5%	5.4%	10.5%	8.0%	53.9%
Municipal Debt Burden as a % of Reserves and Reserve Funds	2.7%	5.5%	4.7%	8.5%	7.1%	33.1%

* 2017 and 2019 ARLs were unavailable. For these years, we used an estimate for the expected ARL and subsequent analysis.

c. 10-Year Operating Results

- Aurora has run a surplus which has contributed to reserve funds growth over the last 10 years.

- From 2014 to 2016, it appears that Aurora experienced a large increase in its annual surplus due to a spike in revenue. However, discussions with Finance revealed that this was accounted for and likely due to recognition of deferred Development Charges revenue for major growth investments in capital. The FIR data indeed validated that this spike in revenue is attributed primarily to a sharp increase in *Deferred Revenue Earned – Development Charges and Donated Tangible Capital Assets*.

Year	Total Revenues	Total Operational Expenses	Annual Surplus/Deficit
2010	$65,606,771	$58,875,588	$6,731,183
2011	$79,442,427	$62,547,410	$16,895,017
2012	$71,870,647	$64,994,839	$6,875,808
2013	$70,409,417	$67,042,851	$3,366,566
2014	$94,494,756	$71,542,598	$22,952,158
2015	$119,373,394	$75,538,823	$43,834,571
2016	$122,594,506	$80,988,095	$41,606,411
2017	$91,860,400	$86,058,726	$5,801,674
2018	$92,057,629	$89,746,743	$2,310,886
2019	$108,429,250	$99,050,986	$9,378,264

d. Taxation, User Fees, and Service Charges

Avg. Rate of Inflation (Last 10 Yrs.): 1.62%

- Municipal property taxes per household in Aurora have grown at a faster rate than upper-tier property taxes per household over the same period.
- Growth in municipal taxes per household have grown at approximately the same rate as inflation over the same period.

Legend:
— Municipal Property Taxes per Household
— Total Property Taxes per Household
— Water and Sewer Charges per Household

Total Property Taxes per Household:
2009: $5,387; 2010: $5,656; 2011: $5,807; 2012: $5,733; 2013: $5,863; 2014: $6,032; 2015: $6,424; 2016: $6,229; 2017: $6,235; 2018: $6,560; 2019: $6,849

Municipal Property Taxes per Household:
2009: $3,707; 2010: $3,881; 2011: $4,023; 2012: $4,017; 2013: $4,142; 2014: $4,274; 2015: $4,593; 2016: $4,478; 2017: $4,486; 2018: $4,746; 2019: $4,985

Water and Sewer Charges per Household:
2009: $615; 2010: $690; 2011: $767; 2012: $808; 2013: $835; 2014: $895; 2015: $1,075; 2016: $1,142; 2017: $1,083; 2018: $1,174; 2019: $1,140

d. User Fees and Expenses – Water and Sewer

User Fees & Service Charges as a % of Corresponding Service Expenses

Municipal

Year	%
2015	92%
2016	90%
2017	92%
2018	96%
2019	90%
2020	98%

Operating Expenses

Year	Amount
2020	$28,723,732.00
2019	$26,609,575.00
2018	$25,237,575.00
2017	$24,010,168.00
2016	$24,326,228.00
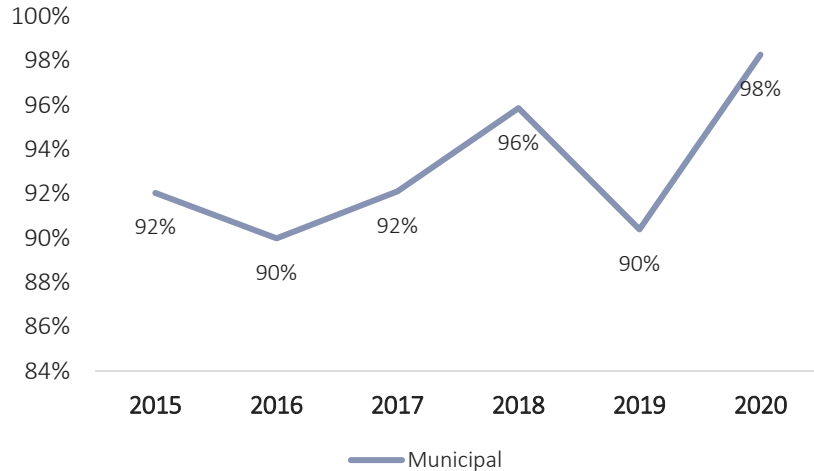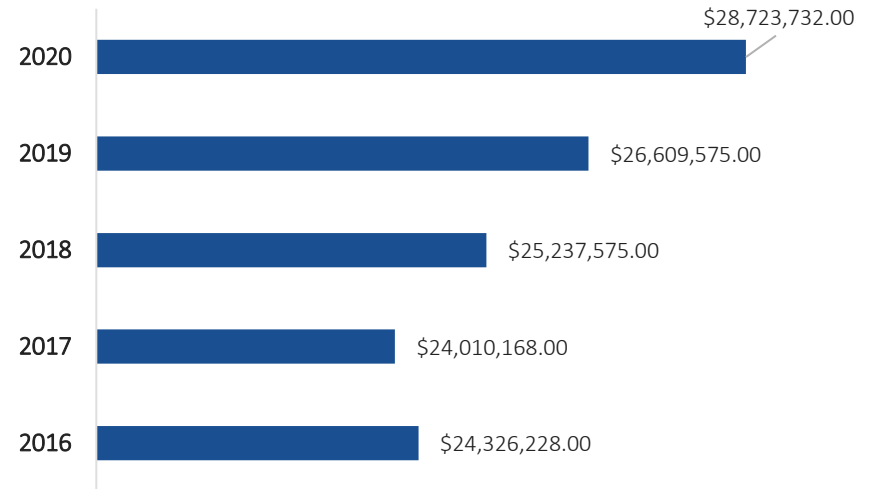
- Water, wastewater, and storm water revenues cover their operating costs for those programs. The Town has an up-to-date plan that predicts water demand and prescribes the rate increases necessary to cover predicted supply operating and capital costs.

6. Appendix B: Peer Benchmarking

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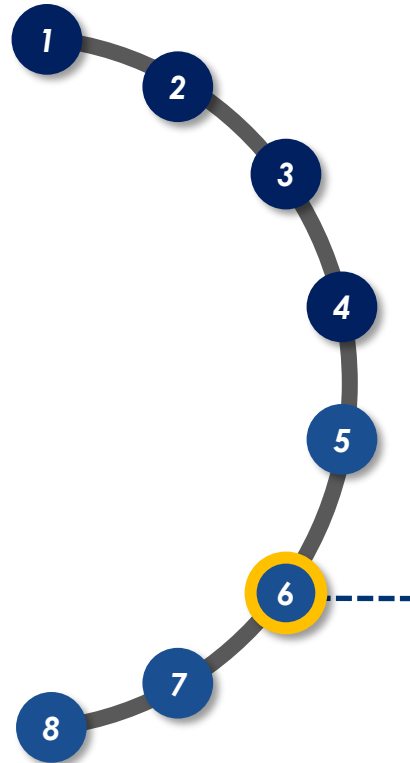
a. Introduction

b. Summary of Themes

c. Indicators and Trends

d. Staff Complement

e. Departmental Analysis

a. Introduction

Comparators were selected in consultation with Aurora. Although comparators are not created equal, the selected comparators together comprise a well-rounded group of municipalities representing Aurora's aspirations, population, growth, wealth, and regional context.

Selection Criteria

StrategyCorp's benchmarking analysis for Aurora is based on five comparator municipalities who were selected against five criteria:

1. **Services Offered:** The peer municipalities should offer similar services to Aurora to be reasonable comparators. Although not all proposed comparators offer precisely the same breadth of services, those selected together comprise all services the Town of Aurora offers.

2. **Population:** Aurora is a geographically small urban municipality with a high population density and population growth.

3. **Income:** Aurora has a high level of wealth measured by average family income.

4. **Government:** Aurora is a lower tier municipality in a regional government. It is useful to select municipalities that also operate using a two-tier municipal structure to permit a reasonable comparison of services.

5. **Managing Growth:** Aurora's interests in preserving natural and cultural heritage as it accommodates growth is also an interesting consideration when picking comparators.

Comparator Snapshot

	Aurora	Newmarket	Oakville	Caledon	Halton Hills	Ajax
Government Type	Lower-Tier	Lower-Tier	Lower-Tier	Lower-Tier	Lower-Tier	Lower-Tier
Persons/km²	1112.3/km²	2190.5/km²	1395.6/km²	96.6/km²	221.4/km²	1786.4/km²
Population	55,445	84,224	193,832	66,502	41,123	119,677
Annual pop. Growth	0.84%	1.06%	1.24%	2.23%	.72%	1.84%
Median family income	$120,795	$109,004	$133,291	$121,673	$121,364	$105,678
Similarities						
"N6" partner	-	✔				
Population size	-			✔	✔	
Population growth	-	✔			✔	
Population density	-		✔			✔
Median family income	-	✔	✔	✔	✔	✔

Note: above data is sourced from the 2016 Canadian national census.

b. Themes and Key Findings

An analysis of Aurora alongside its peer comparators resulted in eight key findings:

Revenue and Household Development
While every community's revenue composition was relatively similar, Aurora is less reliant on property taxation than its peers (45.1%). The Municipality also had the highest proportion of residential development permits at 94%.

Lower than Average Debt and Debt Repayment Charges
Despite a noted increase in debt in previous analysis, Aurora maintains the lowest debt and debt repayment charges, according to several metrics, in the comparator set.

Average Water and Sewer Fees
Aurora charges an average rate for water and sewer charges per household. Although only Newmarket is responsible for billing water rates among comparators, Aurora is performing on-par compared to other municipalities in York Region and beyond.

High Reserves
Aurora has high reserves compared to other municipalities. However, this is due primarily to Aurora's hydro sale funds. A portion of this fund is being spent on the Aurora Town Square and will reduce the Town's reserves.

MMAH Key Performance Indicators
Aurora's comparators also meet most or all MMAH's KPI targets. Over half of comparators outperform Aurora on Operating Surplus Ratio and Asset Sustainability Ratio, which could be areas to consider for further improving Aurora's financial health.

A Comparatively Small Staff Complement
Aurora employs among the fewest staff in the comparator set relative to local population, in addition to the highest part-time staff relative to total staff among comparators.

Large Proportion of Spending on Contracted Services
The Town spends the highest amount on contracted services among comparators, at 49.6%. This includes outsourcing Fire Services to Newmarket and Water and Wastewater Services to York (~56% of contracted spending).

Average Tax Amount On Par with Comparators
Residents in the Town of Aurora pay a municipal tax amount per household ($4,985) that is aligned with that of comparators ($4,753). Notably, Aurora's average Current Value Assessment (CVA) is one of the highest in Ontario.

c. MMAH Key Performance Indicators – 2019 Snapshot

- As observed earlier in this report, on its own, Aurora meets MMAH's standards for its Key Performance Indicators across all categories except for its asset sustainability ratio. On this measure, it is similar to Newmarket and Halton Hills, which also boast a below-average asset sustainability ratio and therefore similar spending to renew existing assets. Overall, these metrics suggest generally good financial health.

- Although Aurora is within target for its Operating Surplus Ratio, it is behind half of its peers who meet the advanced target for this KPI. This means that other municipalities including Oakville, Caledon, and Ajax are bringing in a much higher proportion of operating revenues to support capital funding and other expenditures. However, FIR reporting discrepancies reduce the comparability of the Operating Surplus Ratio significantly.

2019	Aurora	Newmarket	Oakville	Caledon	Halton Hills	Ajax
Operating Surplus Ratio (Target 0% to 15%, Advanced target >15%)	11.8%	5.9%	37.1%	63.7%	-4.2%	40.7%
Current Ratio (Target >=1)	1.24:1	2.22:1	1.46:1	3.73:1	6.64:1	4.45:1
Rates Coverage Ratio (Target >=40%)	80.3%	87.7%	77.1%	88.2%	76.7%	73.5%
Debt Service Coverage (Target >=2)	19	2	11	17	3	32
Asset Sustainability Ratio (Target >90%)	51.4%	69.3%	233.7%	357.8%	66.6%	313.5%

c. Reserves and Performance

5-Year Reserves per Household
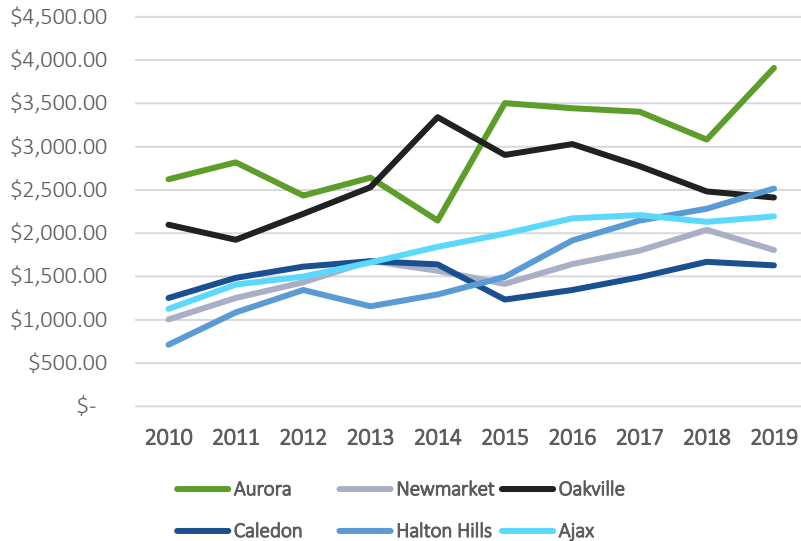
Debt and Reserves – FY 2019

	Aurora	Newmarket	Oakville	Caledon	Halton Hills	Ajax
Households	21,100	30,102	72,893	24,213	22,049	39,200
Reserves	$82.5M	$54.4M	$175.8M	$39.4M	$55.5M	$86.1M
Reserves Per Household	$3,909	$1,807	$2,412	$1,629	$2,516	$2,196
Total Debt Charges	$1.32M	$13.6M	$12.1M	$4.1M	$4.6M	$1.7M
Debt Charges as a % of Annual Repayment Limit	6%	78%	20%	22%	36%	7%
Municipal Debt Burden as a % of Reserve and Reserve Funds	7%	47%	35%	12%	32%	12%

- Between 2015 and 2019, the Town has maintained healthy reserves well above its peers when compared to overall debt burden, households, and annual repayment limit. Relative to its peers, Aurora maintained the largest reserves per household in 2019. However, this may be skewed by Aurora's hydro sale funds, which resulted in high reserves. Many of these funds have been redirected to investments into the Town Square. This will impact reserves and debt performance reporting in 2020/2021, at which point Aurora's reserves per household may be more comparable to peers.

c. Tangible Capital Assets and Municipal Debt Burden

	Aurora	Newmarket	Oakville	Caledon	Halton Hills	Ajax
Total Infrastructure	233,828,799	323,403,334	840,720,190	204,384,316	188,091,381	265,742,229
Total Tangible Capital Assets	427,149,357	502,963,013	1,695,642,621	374,447,454	317,605,649	583,655,639
Total Tangible Capital Assets and Construction in Progress	471,696,547	518,383,541	1,753,800,557	403,313,916	324,840,343	589,107,430
Total Debt	$8,654,243	$45,081,715	$109,562,409	$16,915,210	$23,660,464	$12,609,777
Debt per $ of Tangible Capital Assets	$0.0203	$0.0896	$0.0646	$0.0452	$0.0745	$0.0216

- Aurora is not an outlier with respect to its spending on tangible capital assets and construction.
- The level of debt the Municipality maintains relative to this spending is the lowest of its peer cohort.

c. Operating Revenue Breakdown by Source
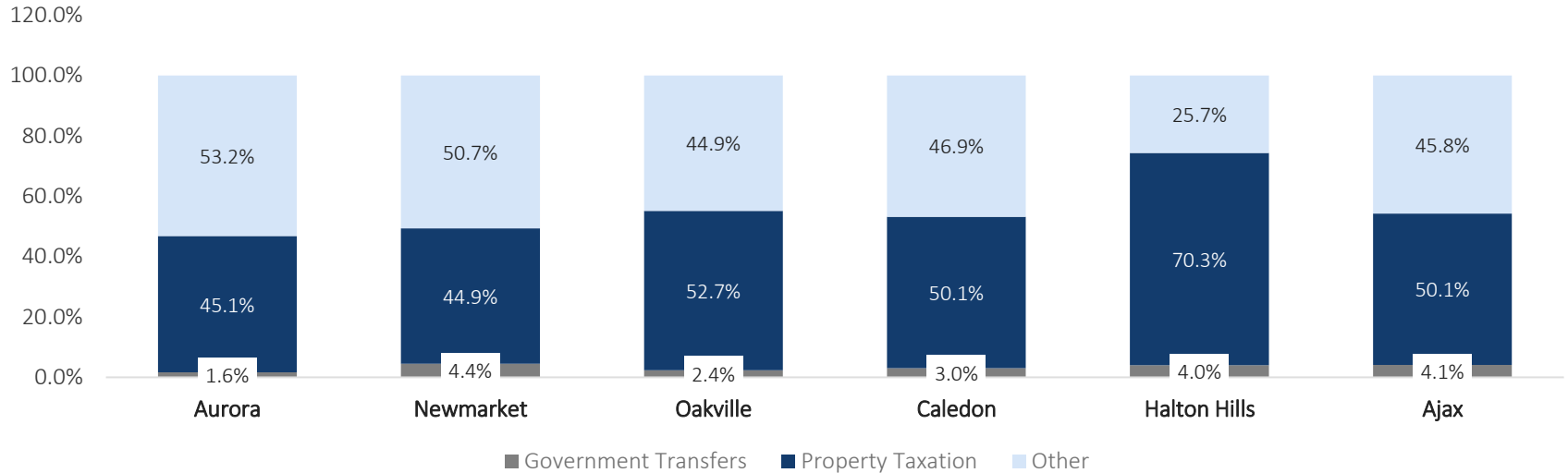
Other includes: Revenue from other municipalities; Revenue from other municipalities for Tangible Capital Assets; User fees and service charges; Deferred revenue earned (Development charges); Deferred revenue earned (Recreation land (The Planning Act)); Donated Tangible Capital Assets Other Revenue

- The Town of Aurora is not an outlier in its reliance on other revenue, although it leads its comparators at **53.2%** of operating revenues.
- In 2019, Aurora had one of the lowest reliance on property taxation as a source of operating revenue among comparators at **45.1%**.

c. Operating Expenditures by Function

Chart: Operating Expenditures by Function. Series legend: Aurora, Newmarket, Oakville, Caledon, Halton Hills, Ajax.

- **General Government:** 12.7%, 3.9%, 9.1%, 12.0%, 9.8%, 9.3%
- **Protection Services:** 14.6%, 15.7%, 17.2%, 24.3%, 18.9%, 22.2%
- **Transportation Services:** 11.1%, 10.9%, 30.6%, 28.3%, 31.6%, 19.8%
- **Environmental Services:** 34.2%, 36.3%, 5.4%, 1.0%, 2.0%, 3.8%
- **Health Services:** 1.4%, 0.5%, 0.1%
- **Social and Family Services:** 0.1%, 1.2%, 0.1%
- **Social Housing:**
- **Recreation and Cultural Services:** 25.1%, 30.6%, 28.8%, 26.4%, 28.4%, 40.2%
- **Planning and Development:** 2.3%, 2.6%, 9.4%, 7.9%, 7.6%, 4.4%
- **Other:**

- Aurora leads comparators in spending on General Government at 12.7%. This may be because others are using corporate allocations and therefore general government costs are not allocated to services, which is not the case in Aurora. As a result, FIR reporting may be skewing comparability. The Town also spends the least on Recreation and Cultural Services, and Planning and Development at 25.1% and 2.3% respectively.

- Aurora is one of the higher spenders on environmental services along with Newmarket, which is driven by water/wastewater and storm expenditures not present in comparator municipalities.

c. Operating Expenditures by Object

Total Spending on in-house staff and contracted services			
	Salaries, Wages, and Benefits	Contracted Services	Total % of OpEx
Aurora	29.2%	49.6%	78.8%
Newmarket	47.6%	34.8%	82.4%
Oakville	52.3%	23.6%	75.9%
Caledon	52.1%	7.5%	59.6%
Halton Hills	54.3%	13.1%	67.4%
Ajax	53.9%	7.4%	61.3%

Legend: Aurora, Newmarket, Oakville, Caledon, Halton Hills, Ajax
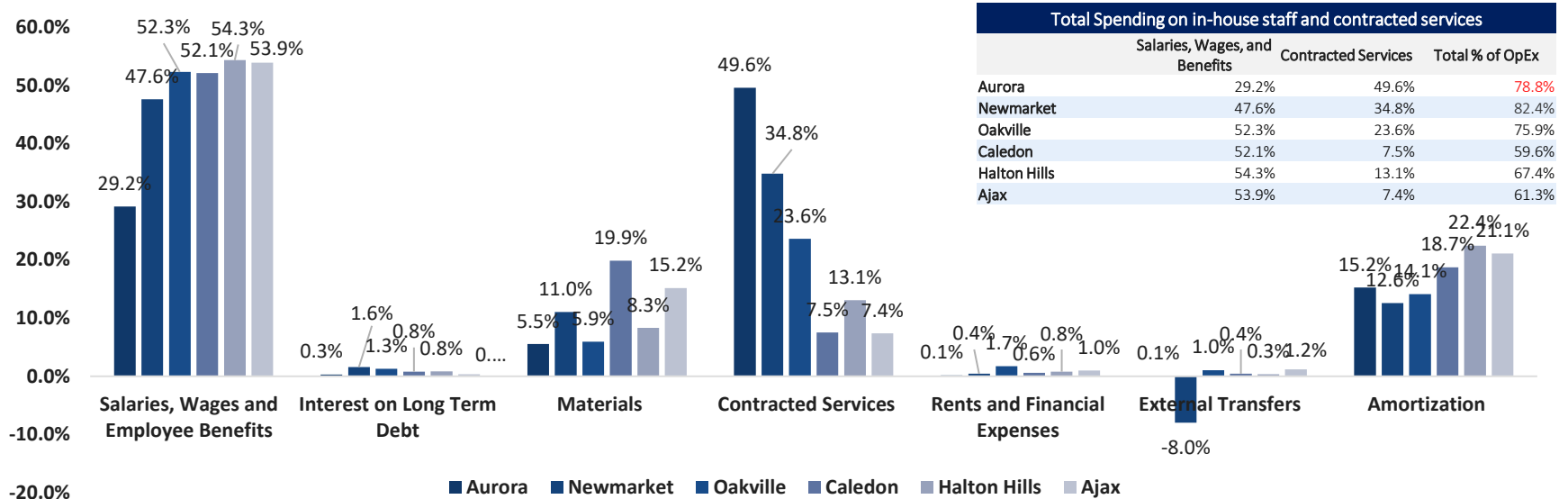
- 78.8% of Aurora's operating expenditures are spent on salaries, wages, and benefits, and contracted services, which leads most comparators.
- Notably, Fire (outsourced to Newmarket), and Water and Wastewater (outsourced to York region) services comprise ~56% of contracted services. Fire Services for Aurora are also what drive Newmarket's higher comparative salaries, wages, and benefits.
- See next slide for more analysis on contracted services spending exclusive of Fire, Water, and Wastewater services.

c. Operating Expenditures – Contracted Services Analysis

- Further analysis was conducted to assess contracted services expenditures among Aurora and comparators. This analysis looks at operating expenditures on contracted services exclusive of Fire, Water, and Wastewater services.
- When removing those services, Aurora still spends the highest among comparators on contracted services (30%), followed by Newmarket (29%).

Breakdown of Contracted Services 2019 – Excl. Fire, W&W Services
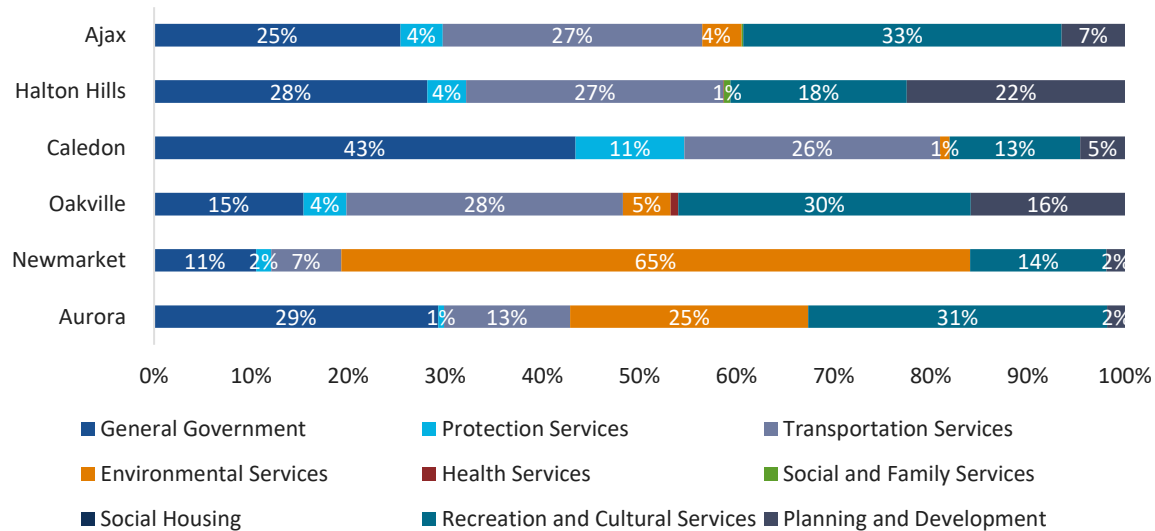
Contracted Services as % of OpEx – Excl. Fire, W&W Services
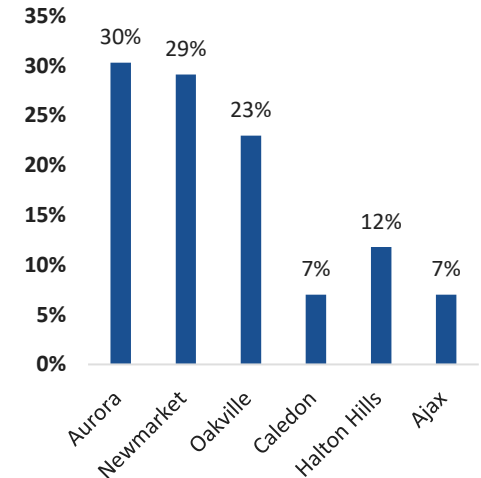
c. Capital Expense Breakdown by Function
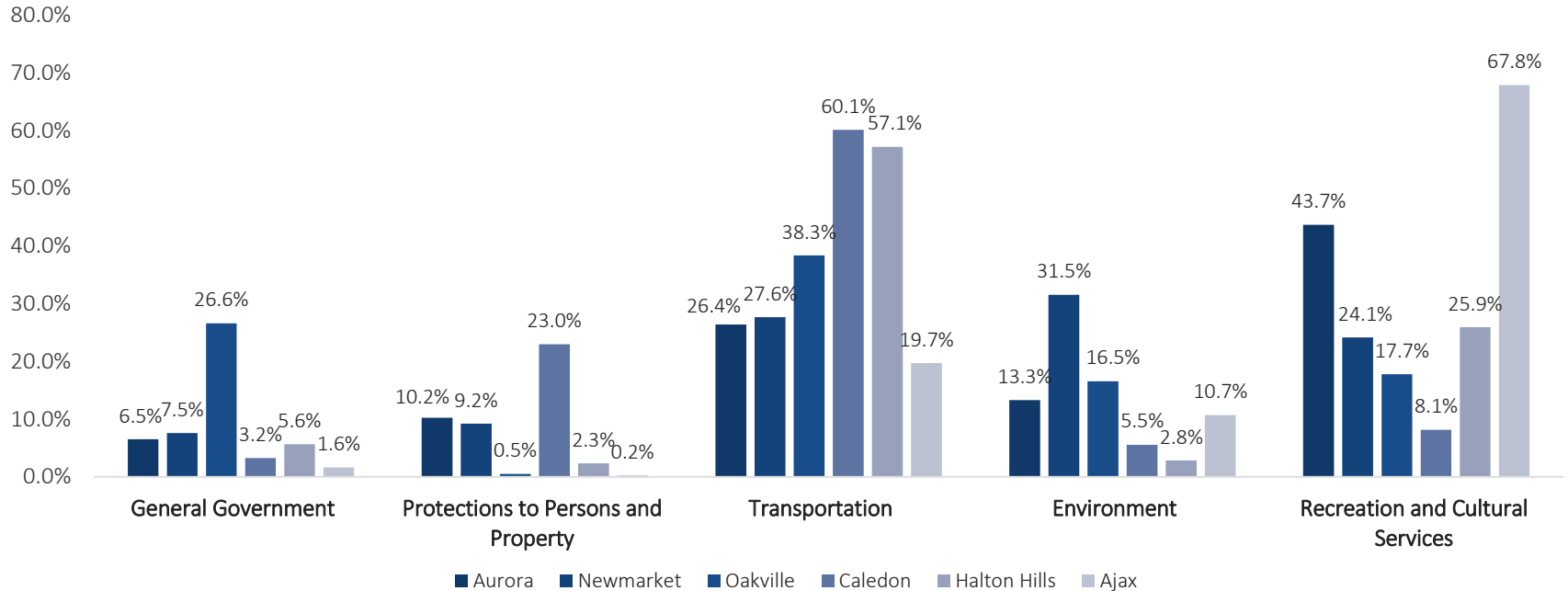
- Aurora is only an outlier on capital spending for Recreation and Cultural Services, which accounted for 43.7% of capital expenses in 2019. Otherwise, there is nothing of note or concern related to capital expenses.

c. Capital Asset Breakdown
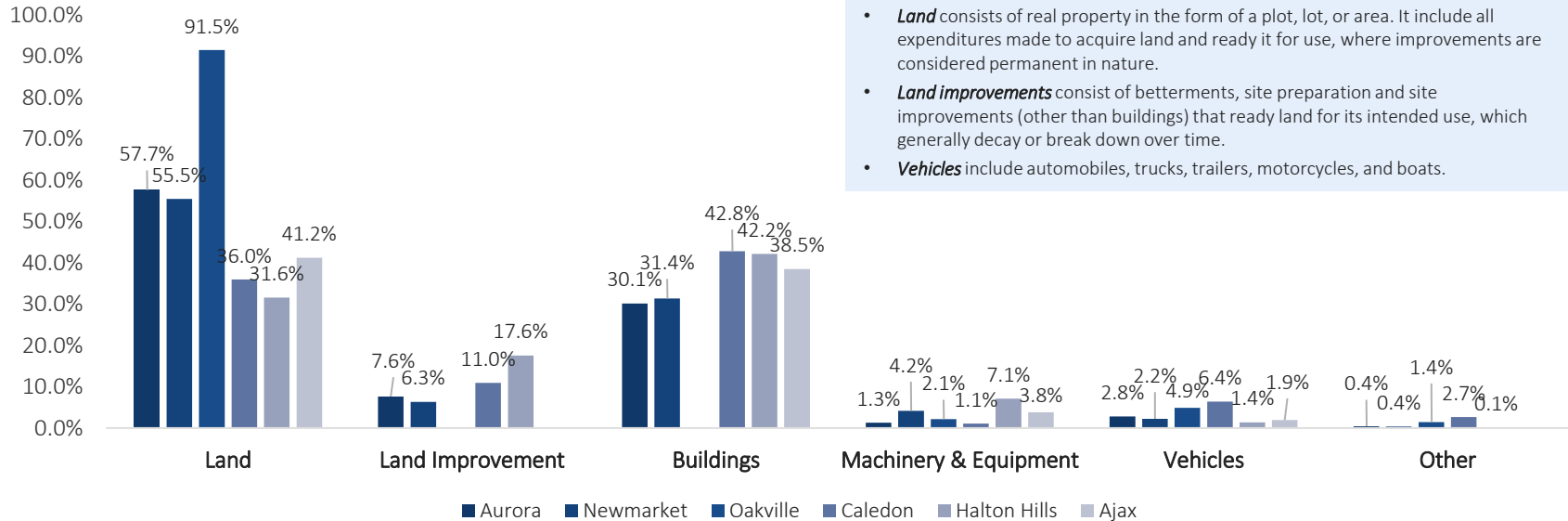
- *Land* consists of real property in the form of a plot, lot, or area. It include all expenditures made to acquire land and ready it for use, where improvements are considered permanent in nature.
- *Land improvements* consist of betterments, site preparation and site improvements (other than buildings) that ready land for its intended use, which generally decay or break down over time.
- *Vehicles* include automobiles, trucks, trailers, motorcycles, and boats.

- Aurora maintains a high proportion of land capital assets and a relatively low proportion of machinery and equipment. Otherwise, there is nothing of note or concern related to capital assets.

c. Municipal Net Debt Charges per Household as a % of Property Tax

The Town of Aurora
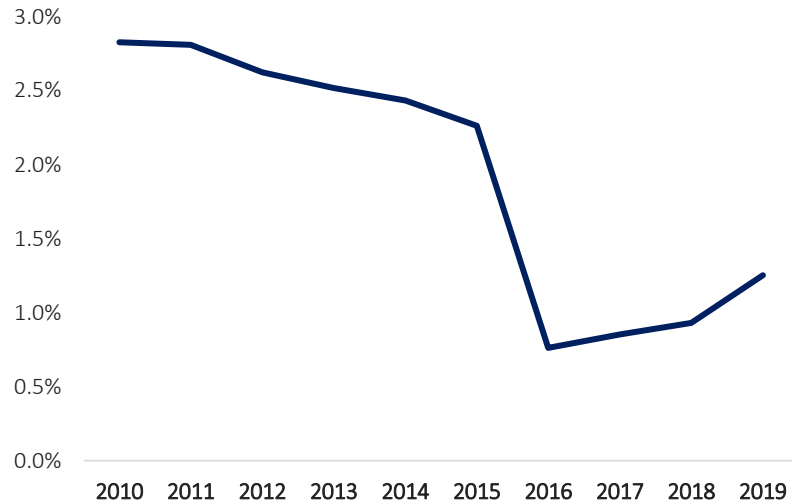
Vis-à-vis Peer Comparators (2019)
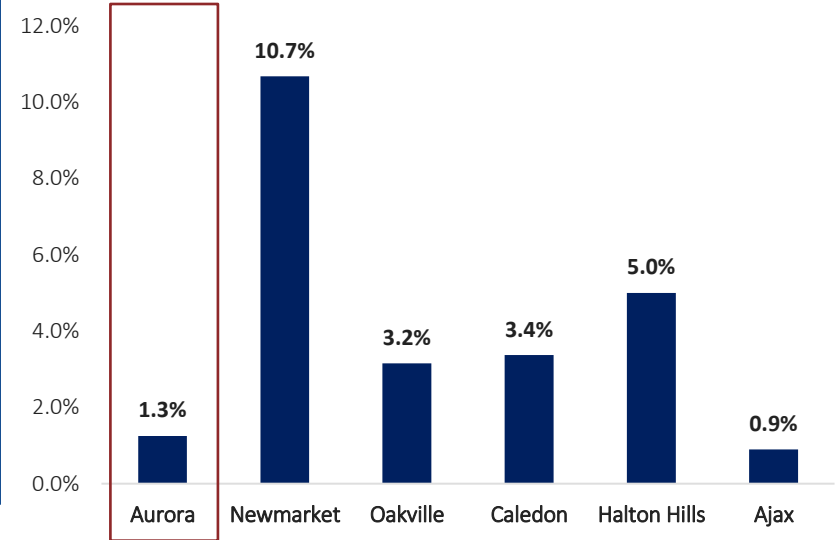
- Falling from the high water mark of the 2010-2015 period, Aurora currently has one of the lowest proportion of tax revenue used to fund debt obligations among comparators at 1.3% of property tax revenues. However, this figure is on an upward trend and has nearly doubled since 2016.

- Notably, not all debt is serviced by taxes. Development charges comprise a major source for debt repayment in order to align to growth.

c. Taxation and Service Charges

Chart: Municipal Property Taxes per Household and Water and Sewer Charges per Household, with average line (Avg. $4,753)

Municipality	Municipal Property Taxes per Household	Water and Sewer Charges per Household
Aurora	$4,985	$1,140
Newmarket	$4,243	$1,390
Oakville	$5,270	$0
Caledon	$5,022	$0
Halton Hills	$4,148	$0
Ajax	$4,849	$0.41
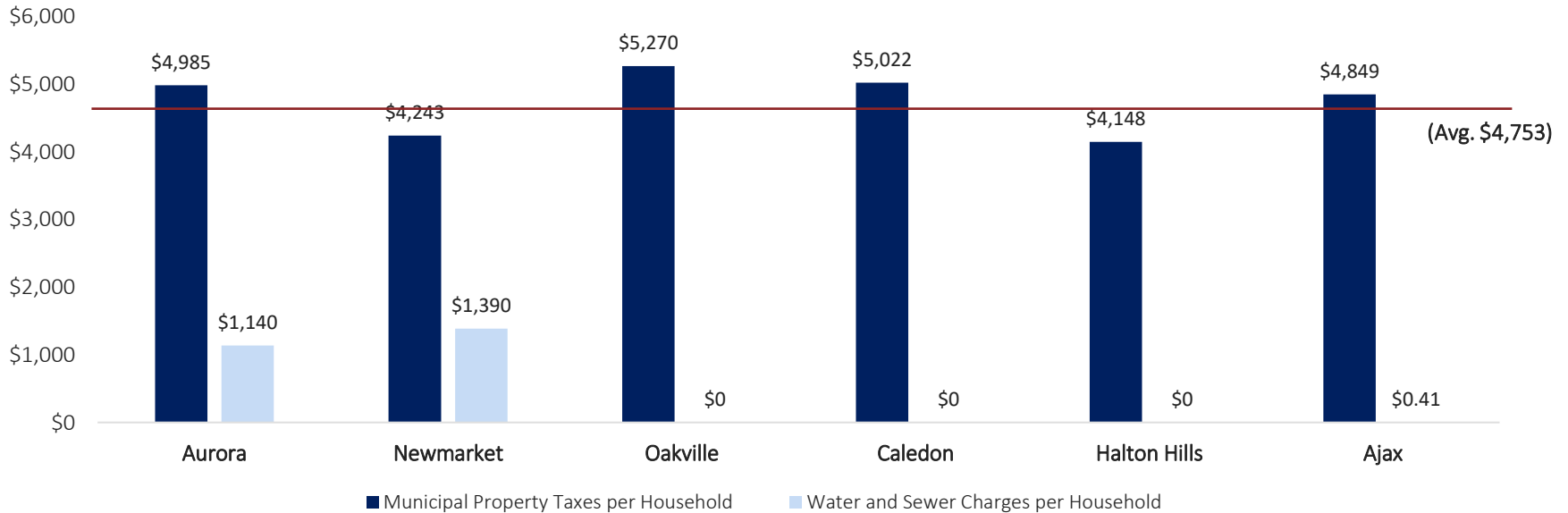
- Aurora maintains a slightly above-average level of municipal property taxes per household relative to selected peer comparators. Aurora also has a high average Current Value Assessment, which drives its comparable tax rate.
- Note that Aurora and Newmarket charge relatively similar water and sewer rates per household, but this information was not available due to lack of data from Oakville, Caledon, Halton Hills, and Ajax. However, these rates are aligned with smaller municipalities like Loyalist and Carleton Place, and are below the rates of other York Region municipalities like Markham, Vaughan, and Richmond Hill.

c. Provincial Tax Rate Comparison Chart

- In 2020 among 35 municipalities, Aurora had the **7th lowest tax rate** across the Province of Ontario.* Aurora also has one of the highest average Current Value Assessments in Ontario, which drives its low tax rate when compared provincially.

Ranking by Rate (%, Lowest to Highest)	Municipality	Property Tax Rate (%)	Property Tax on Home Assessed at $250,000	Property Tax on Home Assessed at $500,000	Property Tax on Home Assessed at $1,000,000
1	Toronto	0.599704%	$1,499	$2,999	$5,997
2	Markham	0.628191%	$1,570	$3,141	$6,282
3	Richmond Hill	0.653108%	$1,633	$3,266	$6,531
4	Vaughan	0.665259%	$1,663	$3,326	$6,653
5	Milton	0.668702%	$1,672	$3,344	$6,687
6	Oakville	0.70997%	$1,775	$3,550	$7,100
7	**Aurora**	**0.752897%**	**$1,882**	**$3,764**	**$7,529**
8	Burlington	0.760563%	$1,901	$3,803	$7,606
9	Halton Hills	0.778645%	$1,947	$3,893	$7,786
10	Newmarket	0.783889%	$1,960	$3,919	$7,839
11	Mississauga	0.785962%	$1,965	$3,930	$7,860
12	Caledon	0.796677%	$1,992	$3,983	$7,967
13	Brampton	0.953306%	$2,383	$4,767	$9,533
14	Ottawa	0.959505%	$2,399	$4,798	$9,595
15	Pickering	1.064088%	$2,660	$5,320	$10,641
16	Ajax	1.069755%	$2,674	$5,349	$10,698
17	Waterloo	1.078456%	$2,696	$5,392	$10,785
18	Kitchener	1.099498%	$2,749	$5,497	$10,995
19	Whitby	1.105208%	$2,763	$5,526	$11,052
20	Guelph	1.122842%	$2,807	$5,614	$11,228

* Full Chart: Jannine Rane, ZOOCASA (2020), https://www.zoocasa.com/blog/ontario-property-tax-rates/

d. Staffing and Human Capital (1 of 2)

Population and Staffing Totals

	Aurora	Newmarket	Oakville	Caledon	Halton Hills	Ajax
Population	62,900	90,156	214,160	74,649	61,161	131,100
Staff/1000 Population	3.78	6.75	7.15	5.68	11.77	4.71
Total Full-Time Funded Positions	238	456	1,240	134	333	378
Total Part-Time Funded Positions	318*	153	292	134	402	239
Total Seasonal Funded Positions	80*	603	100	4	40	406
Total Municipal Workforce	609*	1,212	1,632	180	775	1,023

* Most recent available data is from 2015

Staffing Mix

■ Full-Time Funded Positions as % of Total Positions
□ Part-Time Funded Positions as % of Total Positions
■ Total Seasonal Funded Positions as % of Total Positions
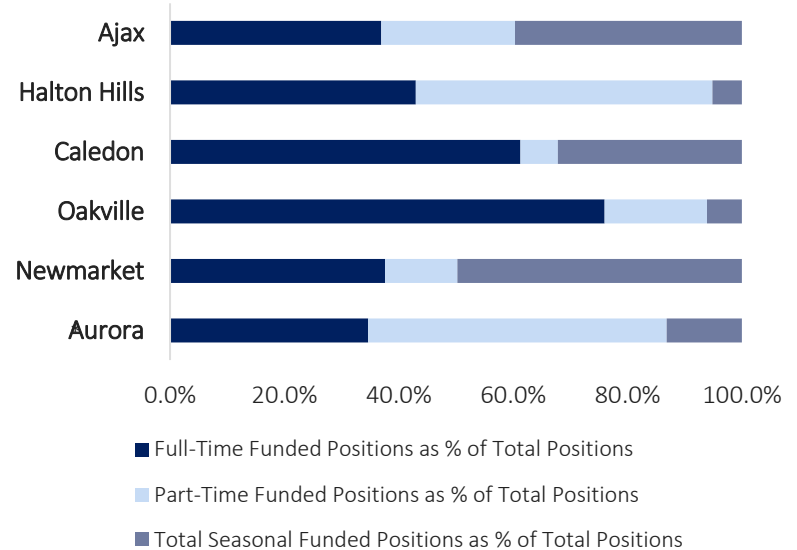
- Aurora maintains the lowest staff to population ratio among peer comparators, and relies on part-time positions most among comparators. However, some staffing data sourced from FIR information is from 2015, and should therefore be compared against more current in-house data.

d. Staffing and Human Capital (2 of 2)

Staffing Totals Across Departments and Organizational Functions (FY 2019)*

	Aurora			Newmarket			Oakville			Caledon			Halton Hills			Ajax		
	FT	PT*	SE*	FT	PT	SE	FT	PT	SE	FT	PT	SE	FT	PT	SE	FT	PT	SE
Admin	81	4		117	31	4	33			99	1	2	66	3		81	20	
Fire				150		2	228			34			58	55		113	1	
Health Services																		
Public Works	31	32	3	60	11	41	89	3	52	64	2	60	100	42	40	76	29	94
Other Social Services																		
Parks and Recreation	80	282	77	76	71	554	245	100	33	74	1	137	62	249		67	188	310
Libraries	20	16		20	36		52	103		27	33		18	48		20	54	
Planning	46			9	2	1	37			60	0	2	17			41	1	2
Other				24	2	1	342	41		25	4			5				
Total	238	334	80	456	153	603	1,240	292	100	383	41	201	333	402	40	398	293	406

* Most recent available data is from 2015

- Aurora maintains the lowest staff to population ratio among comparators, and also has the highest proportion of part-time staff compared to full-time staff.

- Aurora's comparative reliance on part-time staff is most pronounced in Parks and Recreation, aligning only with Halton Hills.

- It is important to note that Aurora contracts out its Fire services to Newmarket and therefore, Newmarket's staff for Fire services also includes staff dedicated to Aurora.

e. Planning and Building Services Department (1 of 2)

Planning and Development Expenses as a % of Operating Exp.
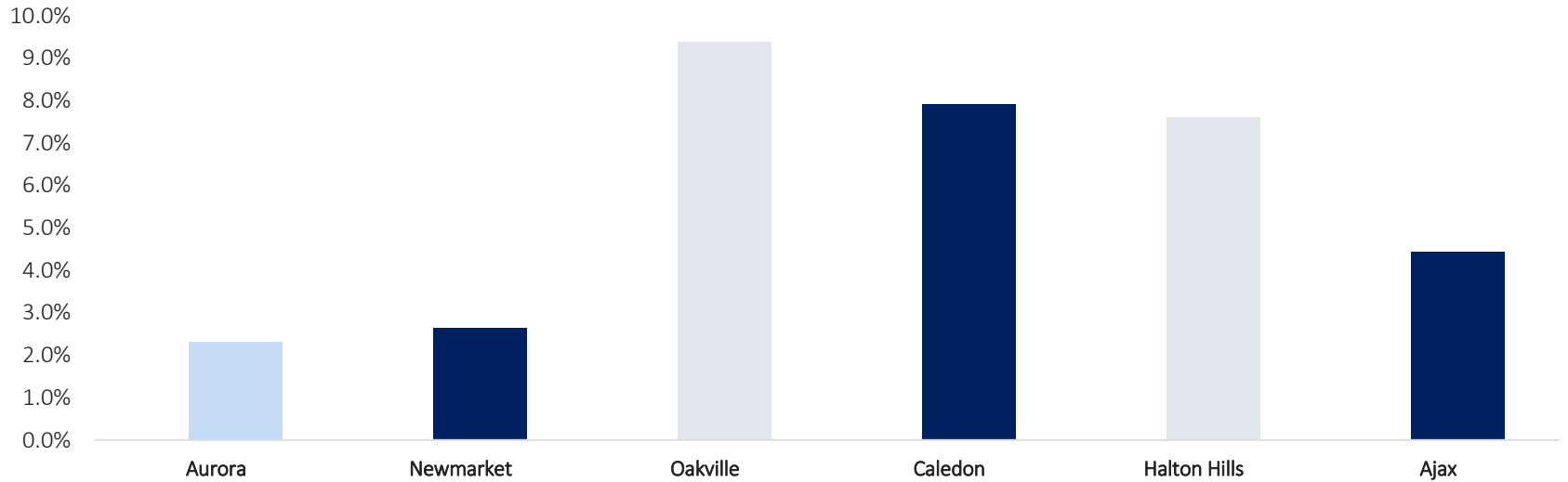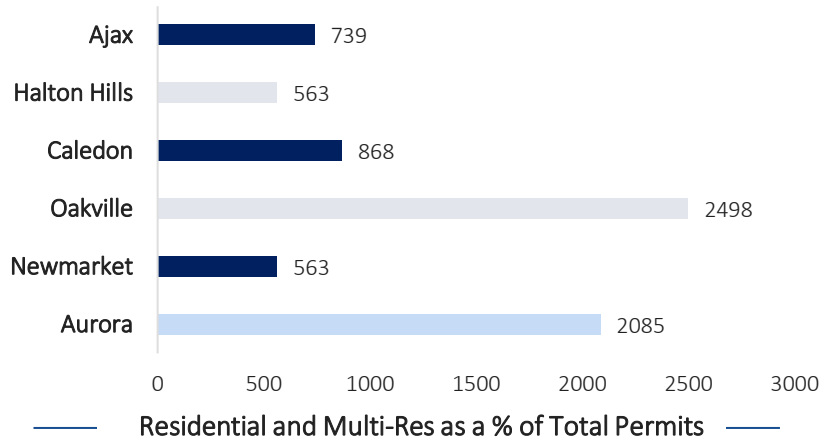

- Aurora spends a comparatively small fraction of its operating expenditures on planning and development. However, peers may group services under Planning and Development differently than how Aurora groups them, which can skew the data.

e. Planning and Building Services Department (2 of 2)

Number of Permits (2019)	Permit Value per Capita

Number of Permits (2019)

Municipality	Permits
Ajax	739
Halton Hills	563
Caledon	868
Oakville	2498
Newmarket	563
Aurora	2085

Residential and Multi-Res as a % of Total Permits

Aurora	Newmarket	Oakville	Caledon	Halton Hills	Ajax
94%	71%	67%	80%	49%	79%

Permit Value per Capita

Municipality	Value
Aurora	$3,242
Newmarket	$982
Oakville	$3,527
Caledon	$4,573
Halton Hills	$1,747
Ajax	$659
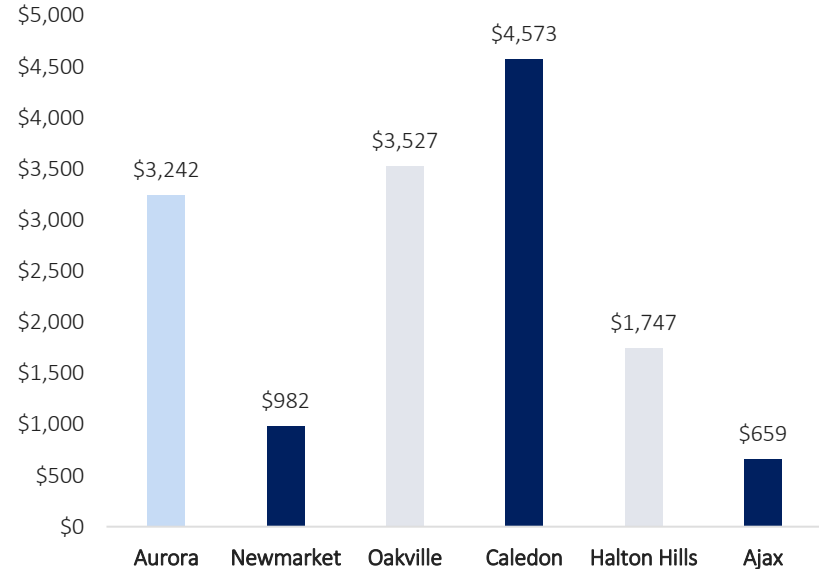
- While Aurora is a leader in its annual permit totals, these applications are overwhelmingly residential at **94%**. This suggests that the Town is more reliant on households to propel its local economy relative to commercial and industrial development, which should prompt some thinking on diversifying the Town's asset base. Aurora has a high comparative permit value per capita, aligned with Newmarket.

e. Parks and Recreation

Proportion of Capital Expenses

■ Recreation and Cultural Services

Proportion of Operational Expense

■ Recreation and Cultural Services
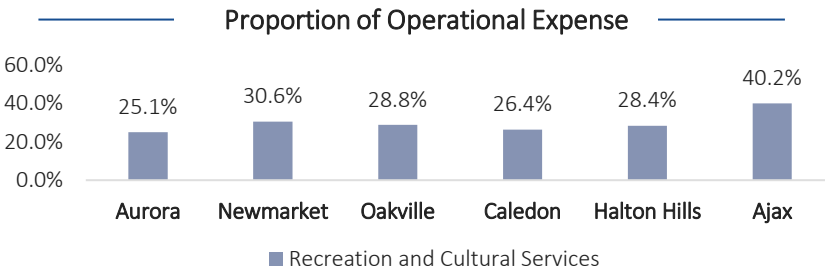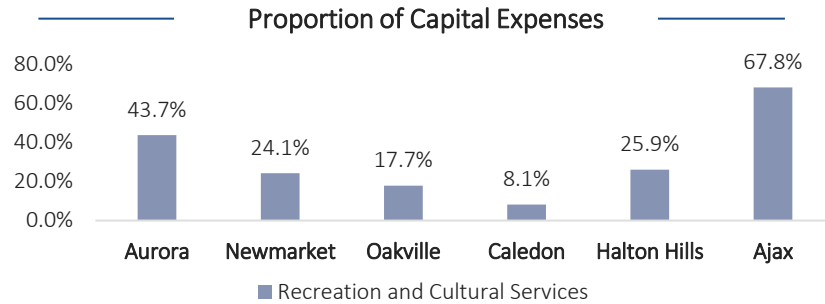
Staff Complement – Parks and Recreation (2019)

	Aurora	Newmarket	Oakville	Caledon	Halton Hills	Ajax
■ FT	80	76	245	74	62	67
■ PT	282	71	100	1	249	188
■ Seasonal	77	554	33	137		310
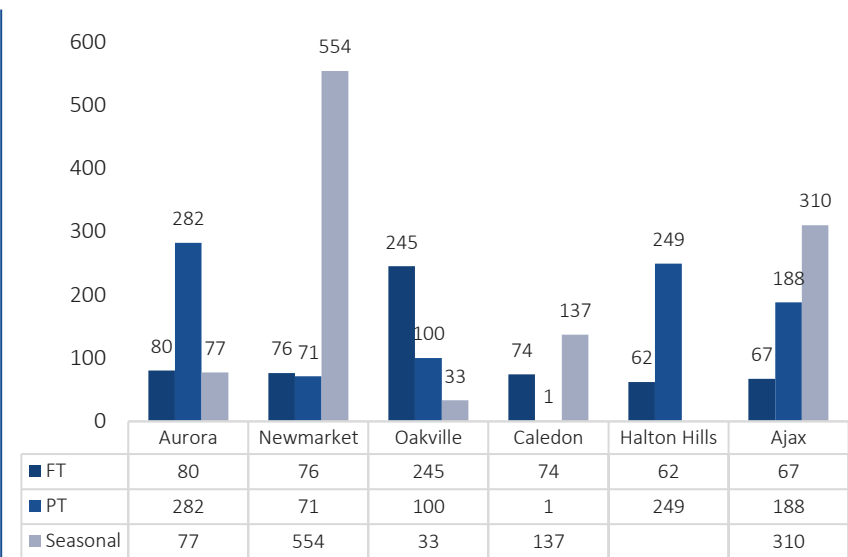
- Aurora spends the second highest proportion of capital expenditures on recreation and culture and the lowest amount of operational expenditures on recreation and culture among comparators. This can explain why the Recreation Development Charge reserve has been negatively impacted as spending has exceeded growth.

- However, the Town does employ far more part-time staff than comparators, aligning only with Halton Hill's staff complement.

7. Appendix C: Detailed Resident Engagement Findings

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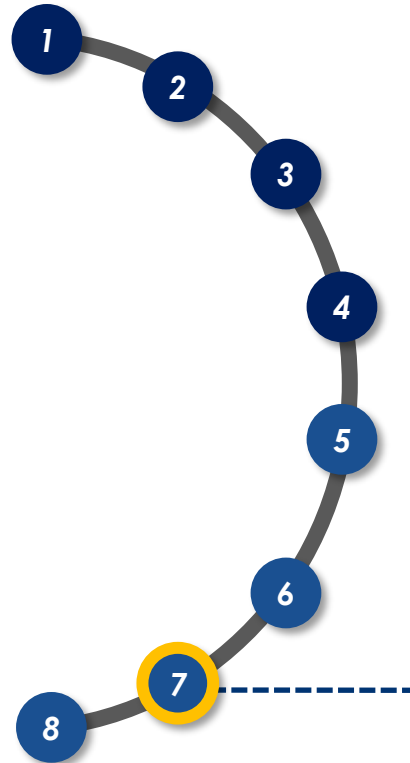
a.   Summary of Themes

b.   Quantitative Analysis

a. Summary of Resident Satisfaction Survey Findings

The Resident Satisfaction Survey is one of many inputs and received 97 responses. The findings are not intended to be statistically significant but rather read as a "pulse check" of the organization.

Overall satisfaction with key resident-facing services
Respondents had high praise for the Town's services including recreation, parks, library, Access Aurora, Machell's Alley, special events, building, and communication.

By-law services were the top mentioned service
Respondents commented that by-law services should be improved. Specific points included the enforcement of noise, property standards, debris, fireworks, and animal/pet by-laws.

Concerns about rising taxes
Residents indicated that taxes were high, particularly for seniors, and some respondents noted that they expect a higher level of service for the taxes that they pay.

Need for better roads and snow removal services
Residents expressed a need for more timely road repairs and resurfacing and enhanced snowplow scheduling, to account for topography and the age of residents.

Services are under-utilized
Eight services had a <10% use rate, and 13 out of 20 of the services offered were used by less than half of respondents. The average use rate across all services was 30.9%.

Appetite for improvement
Despite indicating overall satisfaction with service delivery, most respondents indicated that it was important to them that the Town improves almost all service offerings.

Suggested New Services

- Weekly garbage collection
- Gardening and landscaping workshops
- Paved bike paths around the Arboretum
- More cycling infrastructure
- Use water and tax bills as a communication tool
- Conduct Resident Satisfaction Survey regularly
- Outdoor "gyms" at parks
- Install rubberized flooring at playgrounds
- Snow removal service for elderly and disabled

b. Resident Satisfaction Levels

Reported Satisfaction for Overall Town Service Level

	Very Satisfied	Satisfied	Neutral	Unsatisfied	Very Unsatisfied
	27.8%	54.6%	10.3%	5.2%	2.1%
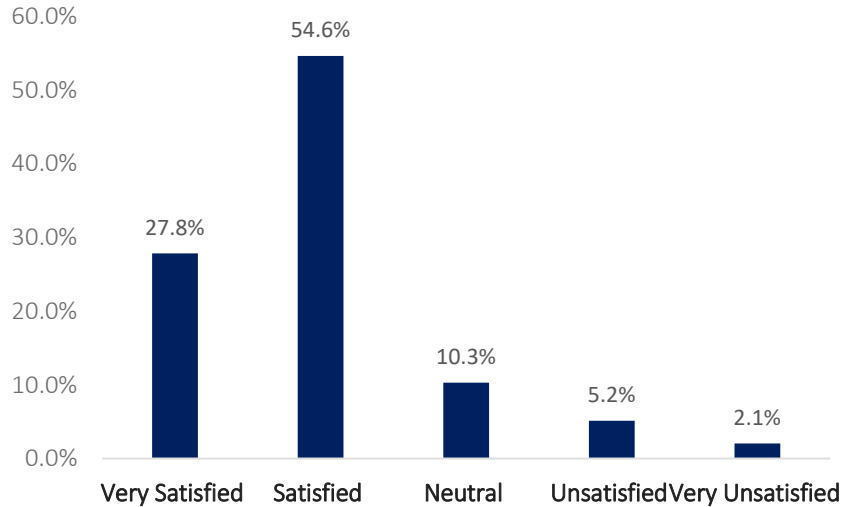
Reported Satisfaction for Town's Communication Level

	Very Satisfied	Satisfied	Neutral	Unsatisfied	Very Unsatisfied
	23.7%	41.2%	22.7%	10.3%	2.1%
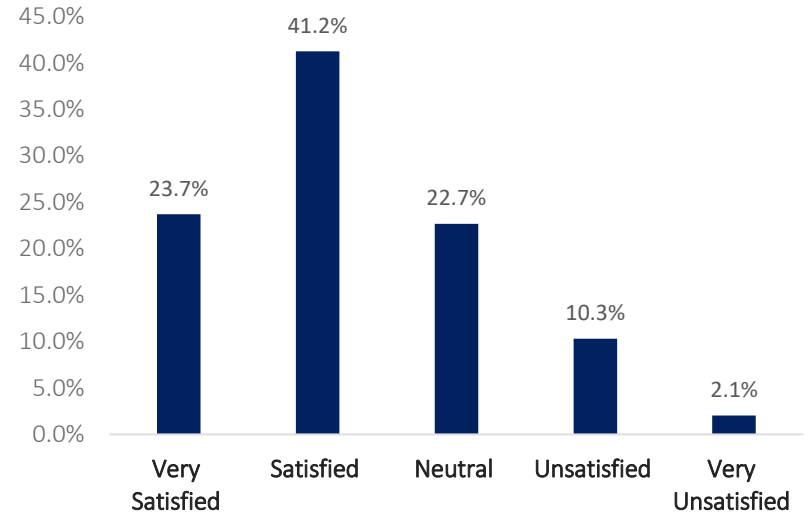
- Survey respondents indicated overall satisfaction with the Town's services and communication levels.

b. Resident Familiarity With Service Offerings

Familiarity With Service Delivery and Operations

Very Unfamiliar — 1.0%
Unfamiliar — 12.4%
Neutral — 28.9%
Familiar — 49.5%
Very Familiar — 8.2%

(axis: 0.0%, 10.0%, 20.0%, 30.0%, 40.0%, 50.0%, 60.0%)
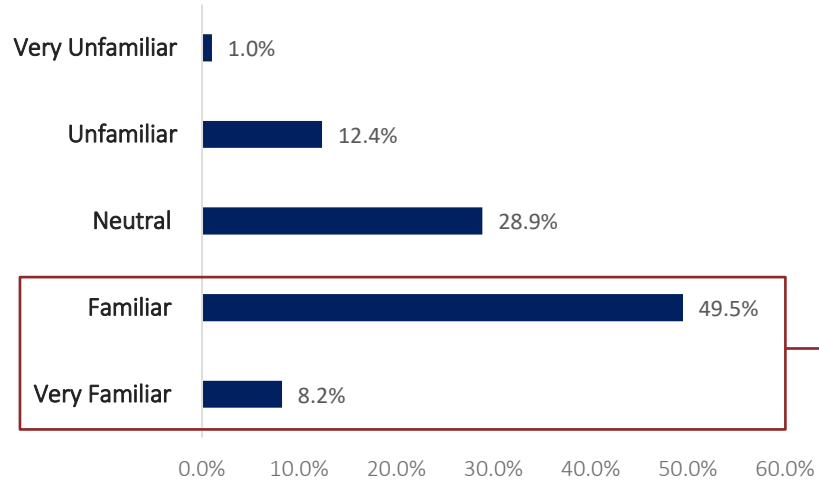
Services With the Highest Level of Familiarity

- Culture — 80.4%
- Water & Wastewater — 81.4%
- Tax & Water Billing — 87.6%
- Roads — 89.7%
- By-law Services — 92.8%
- Parks — 94.8%
- Recreation — 95.9%

(axis: 70.0%, 75.0%, 80.0%, 85.0%, 90.0%, 95.0%, 100.0%)
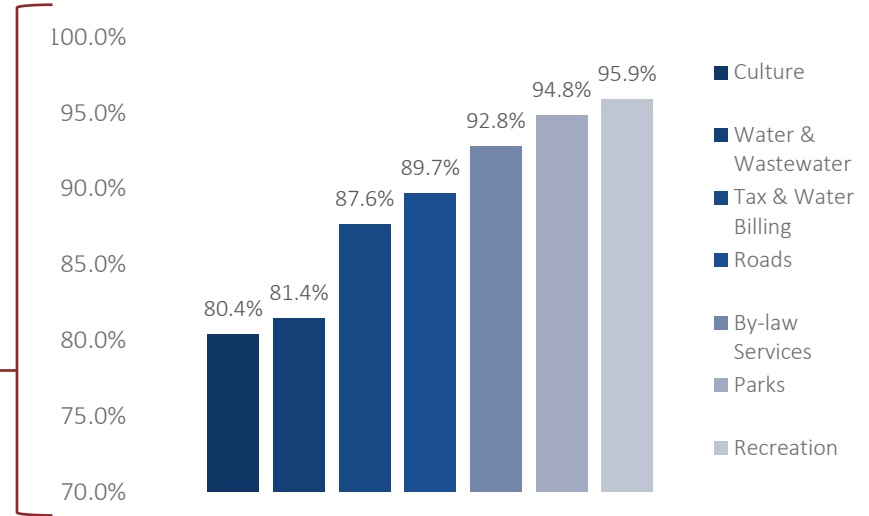
- Respondents are generally familiar with the service offerings of the Town. Levels of awareness vary greatly from service to service, with some services, such as recreation, parks, and by-law having a >90% awareness rate while others, like business support, have a 34% awareness rate

b. Customer Experience

Most Used Services

Service	%
Recreation	82.5%
Parks	76.3%
Tax & Water Billing	71.1%
Water & Wastewater	60.8%
Solid Waste	53.6%
Roads	51.5%
Culture	50.5%
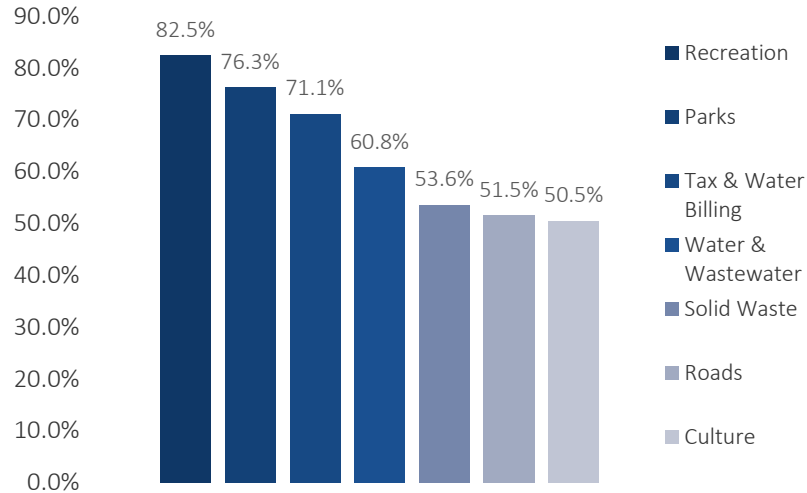
Level of Satisfaction with Most Used Services

Service	Unsatisfied	Neutral	Satisfied
Tax & Water Billing	12.5%	28.8%	58.8%
Culture	9.0%	16.4%	74.6%
Recreation	5.6%	13.3%	81.1%
Water & Wastewater	9.2%	28.9%	61.8%
Solid Waste	6.1%	22.7%	71.2%
Parks	8.0%	6.9%	85.1%
Roads	17.6%	17.6%	64.9%
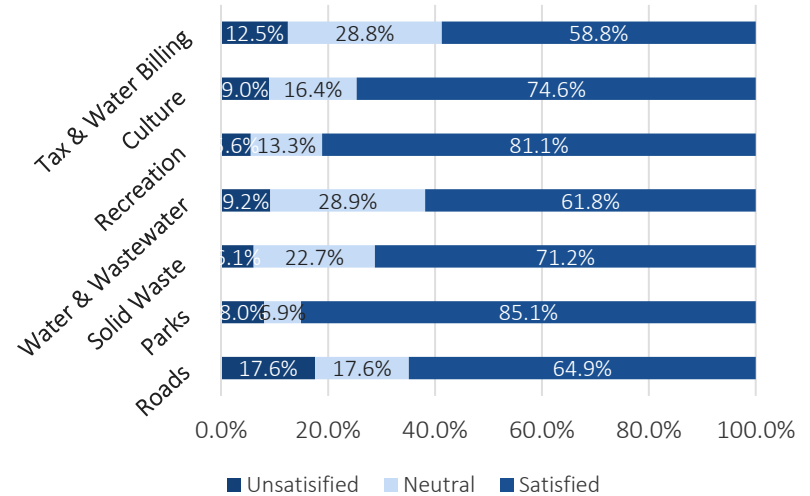
- The most used services correspond to those with the highest rates of awareness. Respondents were generally satisfied with quality of the most used services, with parks having the highest rate of satisfaction within this group.

b. Areas of Improvement

Highest Priority to Respondents

Roads	80%
Economic Development	76%
Parks	73%
Development Planning	73%
Recreation	72%
Communications	71%
By-law Services	70%

64% 66% 68% 70% 72% 74% 76% 78% 80% 82%

Lowest Priority

Records Management	33%
Fleet	42%
Legislative Services	53%
Engineering & Capital Delivery	55%
Facilities Management	55%
Tax & Water Billing	56%

0% 10% 20% 30% 40% 50% 60%
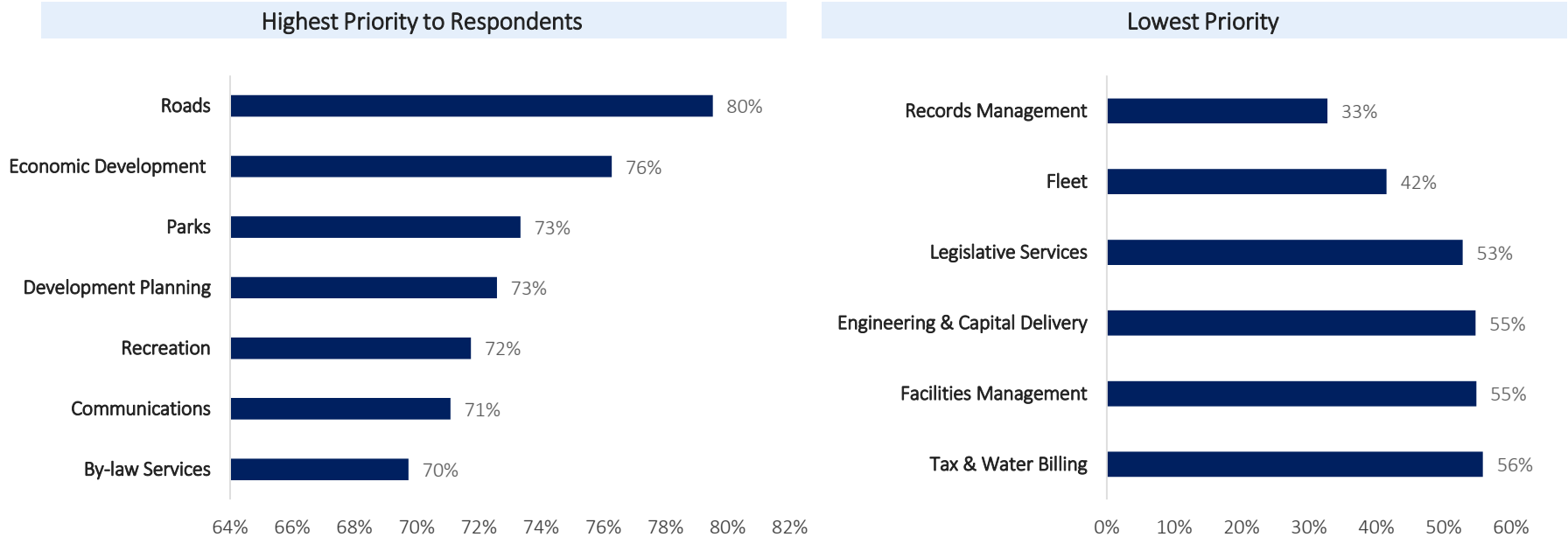
- Respondents indicated the most important areas of improvement, to them, were roads and economic development. Despite indicating satisfaction with parks, recreation, communication, and by-law services, these services were still flagged as high priority areas of improvement.

8. Appendix D: Financial Analysis Assumptions

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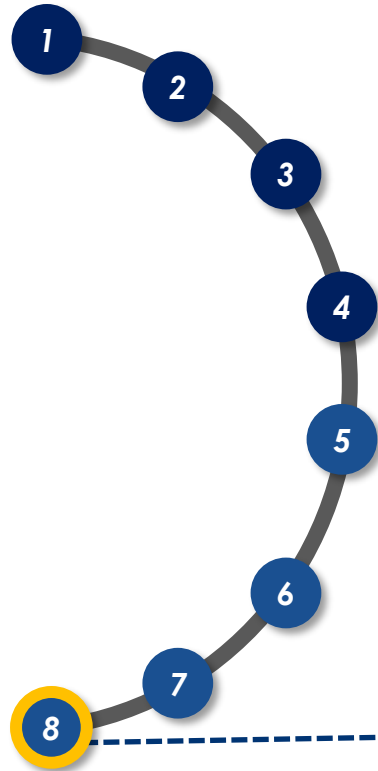
This section includes an overview of assumptions and base values used in the financial analysis.

Financial Calculations: Approach (1 of 2)

The following outlines the approach taken to calculate potential revenues, investments, and cost savings for each opportunity area.

Opportunity	Potential Revenues	Investment	Cost Savings		
			Direct Savings	People & Talent (8-18%)	Digitization (10-25%)	Standardizing Processes (5-10%)

• To estimate how much revenue Aurora can potentially gain from pursuing a new opportunity (i.e., a new service), revenues from comparable municipalities were researched. This formed the base value. • A conservative estimate (i.e., 50%) of that base value was then applied to Aurora. *Potential Revenue for Aurora =* *Comparable municipality revenue x 50%*	• Two types of investment costs were calculated: **Productivity Investment** and **Direct Costs** • **Productivity Investment** calculations used the salaries and benefits value for the employee primarily involved in implementing the opportunity. Estimates were made on approximately what percent of their time over a year would be spent on this opportunity. 　• Most investment costs use CMT salaries as base values. This does not necessarily mean only CMT is responsible for implementation. It is assumed that work will be delegated up or down and therefore, CMT salaries represent a reasonable median cost. 　• Salaries and benefits have been calculated using median salaries in the Town-provided salary grid and increasing the cost by 30% to account for benefits. *Productivity Investment = Salary and benefits value x Percent of time spent/yr* • **Direct Costs** calculations were informed by research on market prices or what comparator municipalities are spending. A conservative estimate (i.e., 80%) of that base value was then applied to Aurora. *Fixed Costs = Market value or comparator municipality spending x 80%*

Financial Calculations: Approach (2 of 2)

The following outlines the approach taken to calculating potential revenues, investments, and cost savings for each opportunity area.

Opportunity	Potential Revenues	Investment	Cost Savings			
			Direct Savings	People & Talent (8-18%)	Digitization (10-25%)	Standardizing Processes (5-10%)

- Two types of cost savings were calculated: **Productivity Cost Savings** and **Direct Costs Savings**
- **Productivity Cost Savings** calculations used the salaries and benefits value for the employee whose time would be saved by pursuing the opportunity. A conservate salary base was used (e.g., using only 30% of total organizational salaries and benefits values or only applying the benchmark to the minimum number of positions that would be impacted). Estimates were made on approximately what percent of their time over a year would be spent on this opportunity.
  - Estimates were informed by either a) directly applying one of the industry benchmarks (as outlined above or in the opportunity profile) or b) consulting staff on approximately how much of their time could be saved. In the case of a) the lower end of the benchmark was used.

Productivity Cost Savings = Conservative salary and benefits value x Percent of time spent/yr (leading industry benchmark or staff reported value)

- **Direct Cost Savings** calculations were informed by reviewing Aurora budgets and identifying direct costs that would be saved. A conservative estimate or a leading practice benchmark was then applied to that base value.

Direct Cost Savings = Aurora spending x Conservative estimate/Leading practice benchmark

The following slides indicate the base value used for each applicable calculation.

Financial Calculations: Base Values (1 of 4)

Opportunity	Potential Revenues	Investment	Cost Savings			
			Direct Savings	People & Talent (8-18%)	Digitization (10-25%)	Standardizing Processes (5-10%)
#1	N/A	2-5% of all CMT salaries & benefits	N/A	N/A	N/A	30% of total salaries & benefits
#2	N/A	Development: 5-10% of all CMT salaries & benefits Annual Review: Included in Opportunity #1	N/A	N/A	N/A	Included in Opportunity #1
#3	N/A	Existing CEP	N/A	N/A	N/A	Access Aurora and Community Services Front-line Staff salaries & benefits
#4	N/A	5-10% of Communications Coordinator salaries & benefits Existing CEP	N/A	N/A	N/A	N/A
#5	N/A	N/A	N/A	N/A	N/A	N/A
#6	N/A	5-10% of 6 Departmental Administrative Assistant salaries & benefits	N/A	N/A	N/A	5-10% of 6 Customer Service Representative salaries & benefits

Financial Calculations: Base Values (2 of 4)

Opportunity	Potential Revenues	Investment	Cost Savings			
			Direct Savings	People & Talent (8-18%)	Digitization (10-25%)	Standardizing Processes (5-10%)
#7	At 50% of Newmarket's projected 2019 revenues for wedding ceremonies	80% of Newmarket's costs for wedding ceremonies	N/A	N/A	N/A	N/A
#8	N/A	Included in level of investment related to Opportunity #2	N/A	N/A	N/A	Included in productivity savings of Opportunity #1
#9	N/A	10% of Manager, Human Resources salaries & benefits 2% of total salaries & benefits	N/A	30% of total salaries & benefits	N/A	N/A
#10	N/A	5% of PMO time over one year	N/A	N/A	N/A	5-10% of Project Manager, PMO time
#11	N/A	N/A. Included in CityView upgrade	N/A	N/A	20% of Admin and Supervisor time on ROP activities.	N/A
#12	80% recovery of expired parking fines in 2020	10% of By-law manager's time	N/A	N/A	N/A	N/A

Financial Calculations: Base Values (3 of 4)

Opportunity	Potential Revenues	Investment	Cost Savings			
			Direct Savings	People & Talent (8-18%)	Digitization (10-25%)	Standardizing Processes (5-10%)
#13	N/A	2-5% of all CMT salaries & benefits	OpEx on Contracted Services (FIR, 2019) minus contracted services spending on Fire, Water, and Wastewater		N/A	N/A
#14	N/A	Included in Opportunity #9	N/A	Included in Opportunity #9	N/A	N/A
#15	N/A	5-10% of Manager, Recreation salaries & benefits	N/A	N/A	N/A	Special Events Staff salaries & benefits
#16	N/A	5-10% of Manager, Facilities Management salaries & benefits	N/A	N/A	N/A	N/A
#17	N/A	Community Programmer salary & benefits	N/A	N/A	N/A	N/A

Financial Calculations: Base Values (4 of 4)

Opportunity	Potential Revenues	Investment	Cost Savings			
			Direct Savings	People & Talent (8-18%)	Digitization (10-25%)	Standardizing Processes (5-10%)
#18	N/A		N/A	N/A		N/A
#19	N/A	Existing Technology Strategic Plan	N/A	N/A	EcDev Team salaries & benefits	N/A
#20	N/A	5-10% of Manager, EcDev & Policy Planning salaries & benefits	N/A	N/A	N/A	EcDev Team salaries & benefits
#21	N/A	5-10% of Manager, EcDev & Policy Planning and Manager, Recreation salaries & benefits	N/A	N/A	N/A	N/A

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