Municipality of Shuniah

Organizational Review

Final Report Presentation

April 20, 2020

Introduction to the Project

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The Municipality of Shuniah ("Shuniah" or "the Municipality"), like other municipalities in Ontario and Canada needs to maintain or increase its service delivery levels and standards while minimizing any tax increases. While recognizing the need for transformation, translating complex service requirements and resident expectations requires new strategic and corporate visions of service delivery, as well as management models to be successful both financially and socially.

The Municipality has engaged MNP to conduct an organizational review to determine if a different organizational structure and service delivery structure should be considered to meet current and future resident requirements. In order to achieve these goals, the Municipality has outlined a desired future state encompassing:

- Stronger relationships;
- Improve the efficiency of service delivery;
- Create a better ability to focus and execute on strategy;
- Clarify roles and accountabilities across the organization; and
- Improve value by achieving more with what you have.

The project involves three phases as outlined below. This report pertains to Deliverable 1, Current State Assessment Report.

Deliverable 1	Deliverable 2	Deliverable 3
Current State Assessment	**Design the Future State**	**Implementation Plan**
• Understand the current structure, roles, and accountability concerns • Assess the strengths and improvement opportunities of the current structure	• Recommend two options for realignment of structure and operations including an assessment of the benefits and risks • Identify changes to roles, responsibilities, resourcing, and culture to support a shift	• Prepare final recommendations for senior leadership structure and roles • Develop a comprehensive implementation plan
Deliverable July: **Current State Assessment Report**	**Deliverable August:** **Future State Design Options**	**Deliverable August:** **Final Report & Implementation Plan**

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Designing the Future State Organizational Structure

1

Municipality of Shuniah's Mandate and Strategic Direction
A clear mandate and vision that sets the strategic direction for Shuniah. This component ensures that the recommended future state structure is aligned with the future direction of the municipality.

2 Current State Assessment Findings

Leading Design Practices and Municipal Scan **3**

These findings identify current areas of strength which should be maintained and areas in need of improvement which should be considered in the future state structure.

Leading practices and a scan of comparator municipalities offer sound perspectives and alternatives to be considered when designing the future state structure.
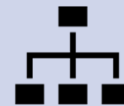
Design Principles

4

Design principles specify requirements that the future structural design should support, and are used to create and evaluate the recommended future state structure (incorporating components 1,2 and 3).
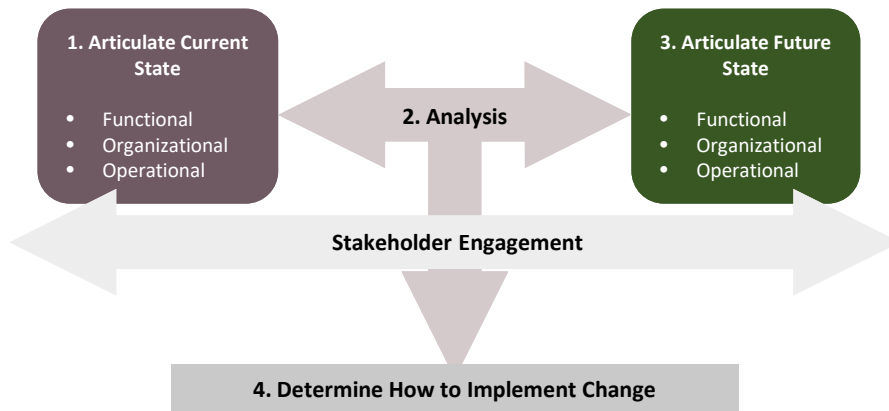
More specifically, these principles are formed from current state assessment findings as well as identified leading practices and insights from other municipalities to determine what the future state structural design should achieve. The future state organizational structure must be aligned with Shuniah's Mission and Vision.

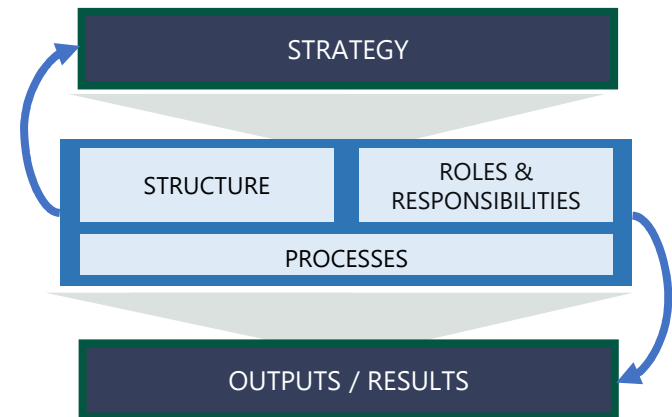Organizational Structure Recommendation

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Our Approach and Methodology

Organizational Review Framework

1. Articulate Current State
- Functional
- Organizational
- Operational

2. Analysis

3. Articulate Future State
- Functional
- Organizational
- Operational

Stakeholder Engagement

4. Determine How to Implement Change

Functional Effectiveness Assessment Framework

STRATEGY

STRUCTURE

ROLES & RESPONSIBILITIES

PROCESSES

OUTPUTS / RESULTS

Our method for conducting the organizational review is illustrated in the diagram above and is based on:

- Gathering information and documenting the current state

- Conducting an analysis of data and information collected and validating findings

- Developing recommendations based on informed analysis, observations and research

- Developing a gap assessment to identify the differences between the current and future state

- Developing an implementation strategy and plan to introduce the identified changes in the organization

In the analysis of the current state, the assessment framework is used to review the organization through a holistic lens. The assessment criteria below will be applied during the assessment of the current state and when evaluating future state options.

- Strategic alignment
- Alignment with stated mandate
- Efficiency
- Division of labour
- Production of quality outputs / results
- Cost

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Based on our documentation review, consultations with staff and elected representatives, an assessment grade has been provided for each of the assessment criteria for the municipality overall, as visually depicted below.

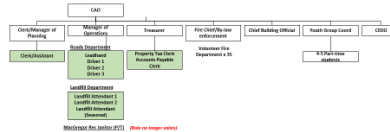| Criteria	Grade	Observations
Strategic Alignment	◐	• Future strategic priorities with respect to economic development are unclear. There is a need to improve alignment between elected representatives and the municipal office in terms of Shuniah's business development and tourism ambitions. A strategic planning exercise can help to clearly define, articulate and communicate the strategic priorities. The feasibility of goals should be assessed against the financial and resource constraints to realistically achieve priorities.
Alignment with Stated Mandate	◕	• Each manager bears responsibility for operational planning and processes within their departments and the majority appear to be aligned with their stated mandates working on the intended activities and to achieve desired outcomes. One area that will require attention is defining the future community services and economic development officer (CEDO) mandate. This is a relatively new function and though progress has been made against the current mandate, the scope of activities should be revisited with an understanding of Shuniah's strategic priorities in this space.
Efficiency	◐	• The Finance department has made great strides in process improvements which has facilitated significant improvements to the efficiency of the function. In other areas, the quality and ease of processes in conducting work activities and achieving objectives could be improved. For example, the Planning department currently experiences a high volume of issues and requests. There is not a shared understanding of how, and who, manages and responds to planning related queries. A gap exists in communicating consistently and / or effectively further compounds this challenge.
Division of Labour	◐	• Issues management is an area that requires attention within the municipality. The municipality does not appear to have a clear commitment to a protocol for co-ordinating internally and tracking resolutions. The functional areas in which this is most prevalent is zoning, planning and by-law enforcement issues and complaints. • The CEDO and Recreation Coordinator are inter-related roles that appear to have shared functional responsibilities and there opportunity to clarify roles and improve collaboration between the two areas. • Some role descriptions have generic descriptions (e.g., Planner / Clerk & Operations) which need to be reviewed and updated.
Production of quality outputs / results	◕	• The quality of outputs is generally good, however there is an opportunity to enhance the technical capability within the planning department to meet the needs of both Council and Shuniah residents. • There is an opportunity to improve management reporting, without impacting productivity.
Cost	◕	• Cost management appears to be reasonable across most departments, however, the fire and emergency services department's expenditure is considered to be inflated by many relative to the municipality's demands.

Total Score   21/30

Legend

● =5   ◕ =4   ◐ =3   ◔ =2   ○ =1

Mandate

The Chief Administrative Officer is responsible for exercising general control and management of the affairs of the Municipality for the purpose of ensuring the efficient and effective operation of the Municipality.

Key Functions

Collaborates with Council to develop corporate strategic plan	Prepares annual business plans for mandated services	Develops & presents annual budgets & reviews depart business plans & budget submissions	Ensures effective implementation of business plan, policies, & programs	Monitors, broadly supervises, & admin. controls budget & business plans
Administration & direction of municipal departments	Resource planning & management	Recommends & implements policies approved by Council	Implement administrative programs & procedures	Reorganizes departments as required with approval of Council
Research & provision of advice to Council (programs & policies)	Approves purchases, sales, expenditures, & adjustments to approved budgets	Develops & maintains liaison with key external stakeholders	Advises & assists Mayor & Council	Directs collective bargaining & recommends approval of settlements

Observations

Key Issues and Gaps
- General consensus that the CAO function is focused, determined, and dedicated to the corporation. While there is a strategic plan in place, there is a lack of alignment on what the municipality should prioritize, particularly with respect to economic development.
- HR related challenges are evident (e.g., training needs, performance evaluations, and reward and recognition) which is impacting morale and productivity.
- Departments appear to operate in silos and there is a lack of management team cohesion and collaboration
- Involvement in resolving department issues and queries (e.g., planning; by-law enforcement) is impacting CAO's workload and management's sense of autonomy.

Key Opportunities
- Implement a formal procedure to improve collaboration and communications on issues that require consultation from multiple areas of the municipality.
- Improve delegation to focus on more strategic issues.
- Identify current and future HR needs and implement a plan to address gaps.
- Collaborate with staff regarding their greatest process and procedural challenges, as well as barriers to cross organizational collaboration.
- Enact cultural challenges by creating an 'external' and 'internal' service experience vision and commitment that articulates what staff should expect in their interactions with one another and the public.
- Develop department KPIs to enable a more transparent and formal performance monitoring process.

Fire and Emergency Services

Mandate

The Fire and Emergency Services department reports directly to the CAO and is responsible for all aspects of fire department operations, reporting and discipline including: fire prevention, fire suppression, emergency and medical response, training, and fire code and by-law enforcement.

Fire Chief (1)

Volunteer / Paid Firefighter (35; inc. Deputy Chief)

Key Functions

Operational planning & periodic reporting to CAO & Council	Facilities (fire stations) & asset inspections / management	Municipal policies, program, & services (fire & emergency)	Establish by-law policies & standard operating guidelines
Resource planning & management	Fire suppression & prevention including education and training	Community emergency management co-ordination	Community emergency preparedness
Depart. financial planning & reporting (inc. cap. projects)	Emergency medical response monitoring	Fire safety public relations and social media management	By-law inspections & enforcement
Weed inspector	Delivery of firefighter education/ training	Residential tenancy act inspector	By-law records & report maintenance

Observations

Key Issues and Gaps
- Fire and Emergency Services operates three fire stations and is supported by volunteer / paid firefighters. The department is well respected and maintains excellent public engagement.
- The function appears to be siloed which is, in part, due to the different fire station(s) locations but further compounded by a lack of management team cohesion.
- A consensus that expenditure is high which requires further inquiry. There is a lack of performance KPIs to evaluate services demand and asset requirements.
- The department is struggling to keep pace with by-law enforcement (mostly reactive), administration and reporting due to workload and resource limitations.
- The department generates revenue from Ministry of Transportation of Ontario (MTO) and Ministry of Natural Resources and Forestry (MNR) for call out services. The invoicing, and tracking, of revenues can be inconsistent.

Key Opportunities
- Implement an administrative role to provide more appropriate support to the department.
- Operations is accountable for all municipal facilities, fire station maintenance could be moved to operations to enable the Fire Chief to focus on core responsibilities.
- Leverage CGIS to formally to track by-law complaints.
- Identify a delegate by-law enforcement officer.
- Strict adherence to complaints policy is required across the municipality by all internal staff involved in the process to ensure consistent service experience
- Consider an inter-municipal agreement with Thunder Bay for smaller ad-hoc roles to focus on core responsibilities (e.g., animal control services, weed inspections, etc.).
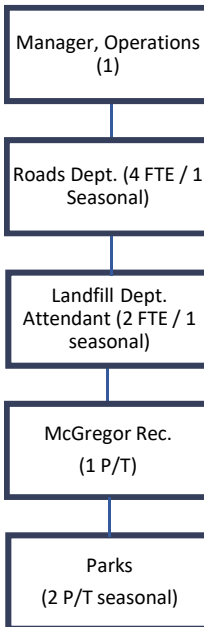- Potential to move MNR / MTO invoicing for call out services to the finance function.

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Purpose

The Operations department reports directly to the CAO and is responsible for the co-ordination and direction of services and operations including the management and development of all municipal properties, public works, waste management, and capital projects.

Key Functions

Operational planning & periodic reporting to CAO & Council	Property standards by-law enforcement (drainage & access)	Occupational health & safety representative
Resource planning & management	Public works & building maintenance management	Municipal building maintenance
Department financial planning & reporting	Road construction & maintenance	Parks & grounds maintenance
Council meeting attendance & reporting	Asset management & planning	Tender development & contractor management
Landfill operations (inc., sewage disposal)	Development & utilization of municipally own lands	Promotion & support for economic activity

Manager, Operations (1)

Roads Dept. (4 FTE / 1 Seasonal)

Landfill Dept. Attendant (2 FTE / 1 seasonal)

McGregor Rec. (1 P/T)

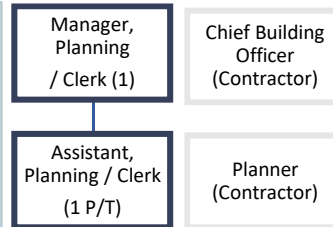**Parks (2 P/T seasonal)**

Observations

Key Issues and Gaps
- The Operations department is respected across the municipality and residents are generally appreciative of the quality of service.
- Road maintenance and improvement services are well managed. Currently, the workload and staffing levels are adequate to support the department needs. However, recent road reclassifications will have a requirement to achieve a standard within a given time period which may require additional support.
- Landfill operations, and maintence of the surrounding areas, near the McGregor and McTavish sites is a challenge and generating complaints from residents. Landfill has been identified by residents as a priority. There is a perception that this is an environmental and health and safety priority.
- An increase in landfill programming demand and trail development planning will have implications in the future (i.e., condition monitoring, maintenance, health and safety etc.). Moreover, McGregor rec. centre has seen an increase in utility. The part-time janitor role no longer exists; instead a cleaner fulfills these duties for one hour a week. Given its increasing utility, it is more difficult to keep up with the requirements.
- Reporting to council on budget spend, work conducted and progress against goals could improve. Records are captured using a paper based system creating a lack of visibility.

Key Opportunities
- A part-time resource may be required to ensure recreation centre facilities are maintained from a health and safety stand-point.
- The prospect of garbage collection is an option for the future that could be helpful for Shuniah's aging population and generate a revenue stream for the municipality.
- Roads unit would benefit from a municipal email to enable information sharing across the corporation.

Planning / Clerk

Purpose

The Planning and Clerk department reports into the CAO and is responsible for supporting the legislative and administrative functions of the Council. The Clerk reports to the CAO and acts as a Secretary to the Committee of Adjustment, Planning Advisory Committee, and Police Service Board.

Manager, Planning / Clerk (1)

Chief Building Officer (Contractor)

Assistant, Planning / Clerk (1 P/T)

Planner (Contractor)

Key Functions

Operational planning & periodic reporting	Issue written comms on behalf of Council, as directed	Provides planning related advice to general public	Zoning & by-law interpretation, amendments & administration
Resource planning & management	Clerical duties for Council (i.e., agenda, documentation minutes etc.)	Provides planning technical advice to council	
Committee secretary duties (i.e., agenda, minutes etc.)	Maintains non-financial records of the corporation	Acts as 'Head' under FOI legislation	
Council meeting attendance and reporting	Acts as policy advisor to committee of adjustment	Negotiates & prepares subdivision agreements	
Consults with various agencies, ministries, & lawyers	Issues letters of compliance	Reviews & processes building permit & zoning applications	

Observations

Key Issues and Gaps
- The Planning / Clerk department works with a contract Planner who deals with more complex planning and zoning issues which provides good support to the department and council. The department also works with a contract Chief Building Officer who reviews building permit applications, inspects properties, and approves applications.
- Demand fluctuates seasonally (high in spring, quieter in fall/winter), however as seasonal residents move to Shuniah full-time for retirement as well as the influx of young families, there may be an increasing demand.
- Zoning is considered a priority activity and likely to increase into the future. Also, environmental issues (e.g., green program) will be an important consideration to maintain the environment.
- A general consensus that day-to-day planning related queries are responded by multiple internal stakeholders reactively. This can result in misinformation being shared, leading to complaints.
- Planning reports to council sometimes lacks information which delays Council decision making process
- Assistant Planning / Clerk role needs to be supported in developing skills and provided with job shadowing opportunities to support the function effectively.

Key Opportunities
- A defined intake process and procedure should be developed to ensure that queries are managed appropriately and directed to the Planning Manager.
- Develop an internal guiding document that outlines frequently asked questions should be developed and approved by the Planning Manager, Planner, and CAO to enable consistent responses to queries.
- Establish better coordination / public expectations.

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Finance

Purpose

The Finance function reports directly to the CAO and is responsible for management of the municipal budget, payroll, taxes, asset management and payments. Finance ensures compliance with all statutory obligations, sound financial management, and accounting practices.

Manager, Finance / Deputy Clerk
(1)

Property Tax / Accounts Receivable
(1)

Property Tax / Accounts Payable
(1 P/T)

Key Functions

Operational planning & periodic reporting to CAO & Council	Prepares and publishes adopted budget & all other financial reports	Supports asset management (planning, inventorying, expenditure, funding)	Supports IT / information system issues and ad hoc front desk queries	Processing of accounts payable & receivable
Resource planning & management	Supports grant and funding applications for various departments	Drives special projects related to financial process optimization	Manages & approves municipal expenses & processes reports	Maintains accurate financial record keeping
Ensures maintenance & confidentiality of financial information	Assumes Deputy Clerk duties, as required	Ensures compliance with all statutory obligations	Manages payroll & HR admin (employment records)	Calculation & collection of taxes & other revenue sources

Observations

Key Issues and Gaps
- The Finance department has strong working relationships across the municipality and has made significant progress in the way of process improvements. In doing so, the department has strengthened the capabilities of the function, reduced duplication of effort and achieved efficiency enhancements.
- Communication and collaboration among staff is good which further enables the quality of outputs.
- Workload appears to be manageable and staffing levels are adequate to support the function.
- The Deputy Clerk accountabilities are not fully understood.

Key Opportunities
- Timely release of annual budget could be improved to enable work on tenders and funding applications.
- Though Deputy Clerk responsibilities are to be assumed in the absence of the Clerk or CAO at Council meetings; the requirements need to be clearly articulated to ensure effective execution of duties at council meetings.

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Community Services and Economic Development

Purpose

The Community Services and Economic Development Officer (CEDO) reports directly to the CAO and is responsible for facilitating community and economic development planning and initiatives; securing funding for economic development activities and programs; assist local groups, businesses and individuals with establishing economic development plans and projects; and the development and expansion of community services as they relate to the 2016-2020 Strategic Plan.

Key Functions

Identify sectoral opportunities for economic development	Facilitate community & ED planning process & diversify tax space	Organize & facilitate community programs	Collaboration with community stakeholder groups
Research & preparation of proposals for funding opportunities	Securing grants and finding funding opportunities	Support initiatives that increase employment opportunities	Develop & promote tourism strategy with community input
Improvement & development of green spaces, trails, & parks	Launch community beautification initiative	Expand community programs, services, & facilities usage	Increase services & supports to elderly seniors

Observations

Key Issues and Gaps
- The CEDO function was established to elevate community services and economic development in Shuniah. The function has successfully executed against its mandate to date in securing grants. Co-ordination of community initiatives have proven to be successful (e.g. day camp, shuffle board, community clean up).
- There is a lack of alignment regarding Shuniah's economic development vision.
- Workload appears to be manageable however, there is a consensus that this role could be a part-time function.
- There appears to be some overlap with the role and responsibilities of the Recreation Coordinator.

Key Opportunities
- Build a stronger partnership with neighbourhood groups to drive community engagement activities. Coordination and collaboration between the municipality and neighbourhood groups will enable alignment with broader community initiatives.
- Opportunity to make community initiatives more accessible for the elderly through the provision of a shuttle service to attend programs.
- The current incumbent has resigned which creates an opportunity to revaluate the role moving forward. This role could be repositioned as a part-time role and focus exclusively on community development initiatives and management of recreation facilities and programs.
- The integration of activities with the Recreation Coordinator role needs to be enhanced to achieve a more cohesive approach to community initiatives.

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Recreation Coordinator

Purpose

The Recreation Coordinator reports directly to the CAO and is responsible for managing and coordinating Shuniah's youth centre programs.

Coordinator, Recreation
(1 P/T)

Youth Group Supervisor
(1 P/T)

Youth Group Support
(1 P/T)

Key Functions

Planning, development, organization, & preparation of youth programs	Scheduling and maintence of recreation centre calendar of events / programs	Reports building and ground repairs / maintence needs to the Operations Manger
Collaboration with community groups (e.g., school, kids, parents,	Respond to issues and queries relating to rec. centre events / programs in-person & via email	Procurement, & invoicing, of program & recreation centre supplies
Promote and publicize community events on social media (e.g., Facebook page, Shuniah newsletter)	Supervise and coordinate part-time youth group staff & volunteers	Recruit program facilitators that can deliver sessions at the recreation centre
Reports to the policing & recreation committee		

Observations

Key Issues and Gaps
- The Recreation Coordinator function focuses largely on youth group activities however the role has expanded into other areas over the years (e.g., annual garage sale, brownies, yoga, self defence, babysitting courses, etc.).
- Workload appears to be manageable however there appears to be an overlap with responsibilities of the Community Services and Economic Development Officer.
- In the absence of a caretaker, this function appears to have acquired some responsibilities that are typically associated with a care-taker role (e.g., procurement and invoicing of recreation centre supplies; keys distribution, monitoring and reporting building and ground repairs / maintenance to Operations Manager; occasional call outs to the recreation centre, as required).
- A lack of resources to support the centre is limiting the expansion of programs / events. As an example, there was demand for a card group, however there is a lack of resources to operationalize the program.

Key Opportunities
- The promotion and building awareness of community programs and events is an area of improvement. In particular, the municipal website requires more frequent updates on upcoming community activities.
- Add a central booking system for the recreation centre through the municipal website to enable online program registration, facility bookings and calendar access. This would support more effective internal coordination and closer monitoring of demand for facilities and programs.
- As demand for the recreation centre will increase, it may be necessary to reimplement the care-taker role (P/T).
- The integration of activities with the Recreation Coordinator role needs to be enhanced to achieve a more cohesive approach to community initiatives.

Environmental Scan Overview

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Comparator Profile Summary

As part of the environmental scan, MNP compared the municipalities, townships and villages with Shuniah. Each organization was selected for this scan based on their demographic similarities in key areas. The scan uncovered interesting ideas related to organizational design and strategic and tactical approaches to provide considerations for Shuniah in terms of future structural and operational options.

Municipality	Seasonal Fluctuation	Size (Land Area / population)	Population Density	Operating Budget	Private Dwellings	Median Age	Median Household Income
Shuniah	Yes	570.99 km² / 2,798	4.9 km²	$8,113,188	2,130	52.8	$96,939
Lake of Bays	Yes	671.50 km² / 3,167	4.7 km²	$8,185,025	4,388	57.5	$69,888
Oliver Paipoonge	No	350.30 km² / 5,922	16.9 km²	$9,452,353	2,289	41.3	$74,287
East Ferris	Yes	149.8 km² / 4,750	30.6 km²	$7,607,341	2,084	47.8	$92,199
Central Manitoulin	Yes	431.11 km² / 2,084	4.8 km²	$4,562,252	1,629	56.7	$59,328
Point Edward	TBD	3.27 km² / 2,037	620.6 km²	$6,582,780	960	51.5	$74,752
Mattawa	TBD	3.66 km² / 1,993	553.5 km²	$3,382,181	888	51.4	$45,739

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Lake of Bays: Organization Design Areas of Interest

The Lake of Bays' CAO has the same span of control as Shuniah (7:1) however differs in terms of some structural design elements. Of note is the placement of by-law enforcement under the mandate of Building Services, which shares administrative support with the Planning function given the cross over. Like Shuniah, the Township has HR responsibilities located within Finance function.
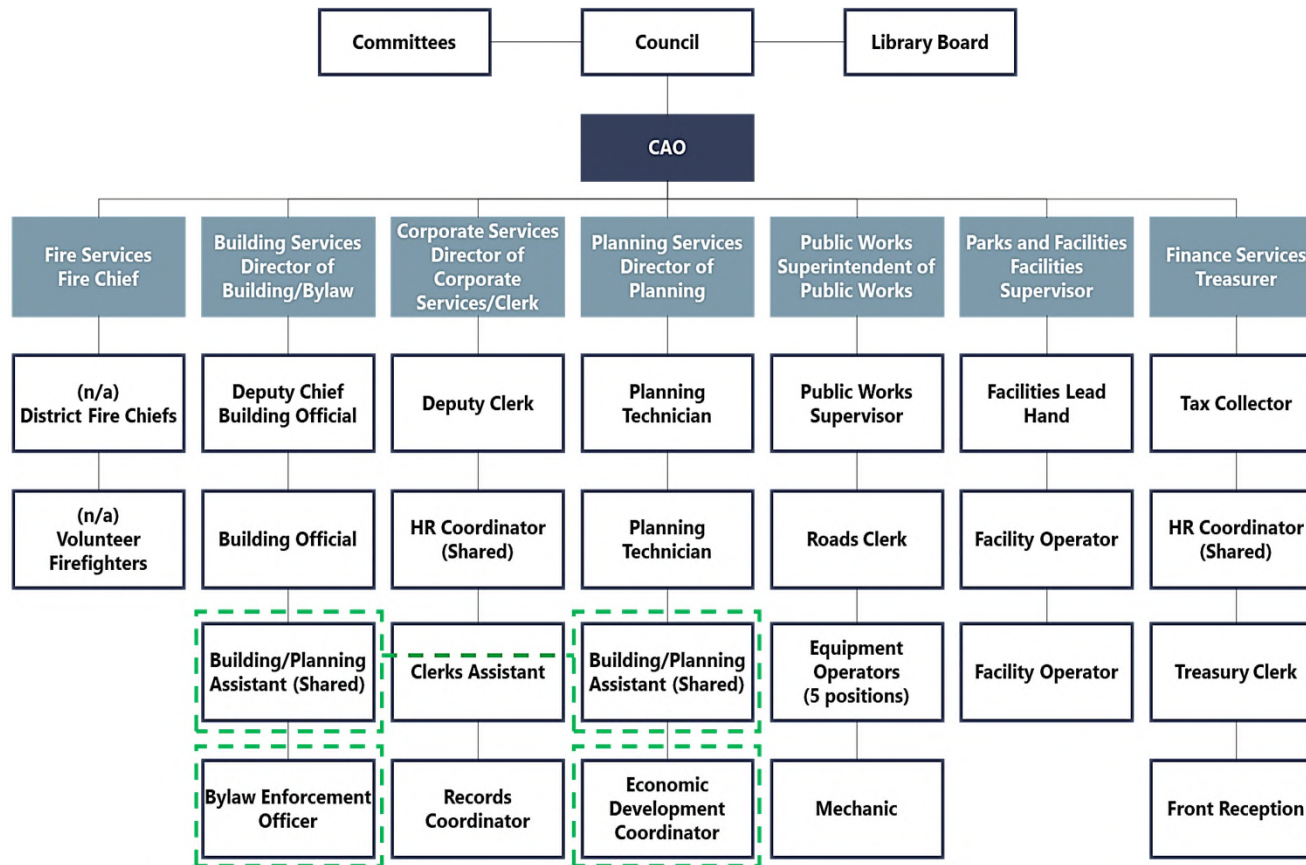
Observations

1. **Economic Development** function located within Planning department.

2. **By-Law Enforcement** is executed by the Building Services function and shares a building / planning assistant with the Planning Services department. Given the building and planning knowledge and skills required to enforce bylaws, this decision is sensible.

3. **HR function** is shared across corporate services and treasury departments.

4. **Corporate services** has a dual role as Clerk.

5. **Parks and Facilities** is separate from Public Works (Shuniah's Operations equivalent).

Legend:

⟦ ⟧ **Areas of Opportunity**

East Ferris has a reduced span of control (3:1) by comparison to other municipalities, including Shuniah. This is enabled through a two tier governance structure. Our assumption is that the executive management layer involves more strategic initiatives while the senior management team are operationally focused. Like Lake of Bays, by-law enforcement responsibilities fall under the mandate of the Chief Building Official and though not illustrated below, economic development duties fall under the mandate of Planning function.
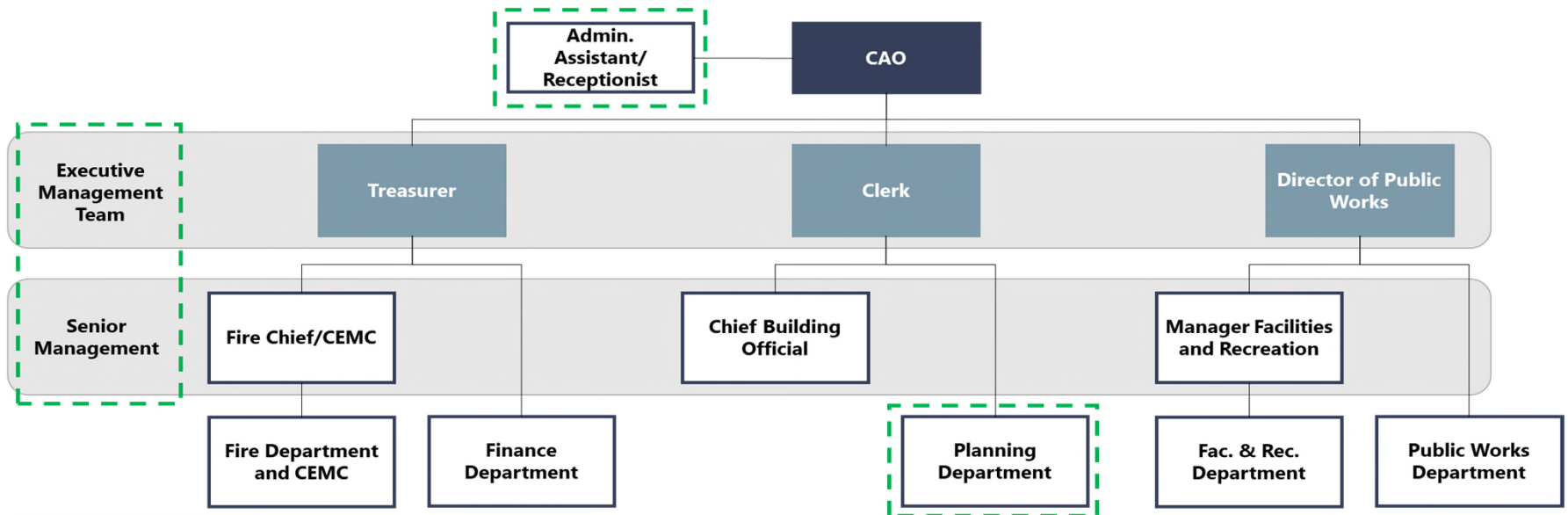
Observations

1. **CAO** function has administrative assistant support.

2. **Economic development** duties are located in the Planning department.

3. **Chief Building Official** responsibilities include by-law enforcement.

4. **Facilitates and recreation management** is a separate function to public works.

Oliver Paipoonge CAO has a similar span of control (8:1) and shares structural parallels with Shuniah (e.g., HR responsibilities located under Treasury). However, interesting opportunities to explore further are highlighted below and relate to economic development, by-law enforcement and Clerk duties.
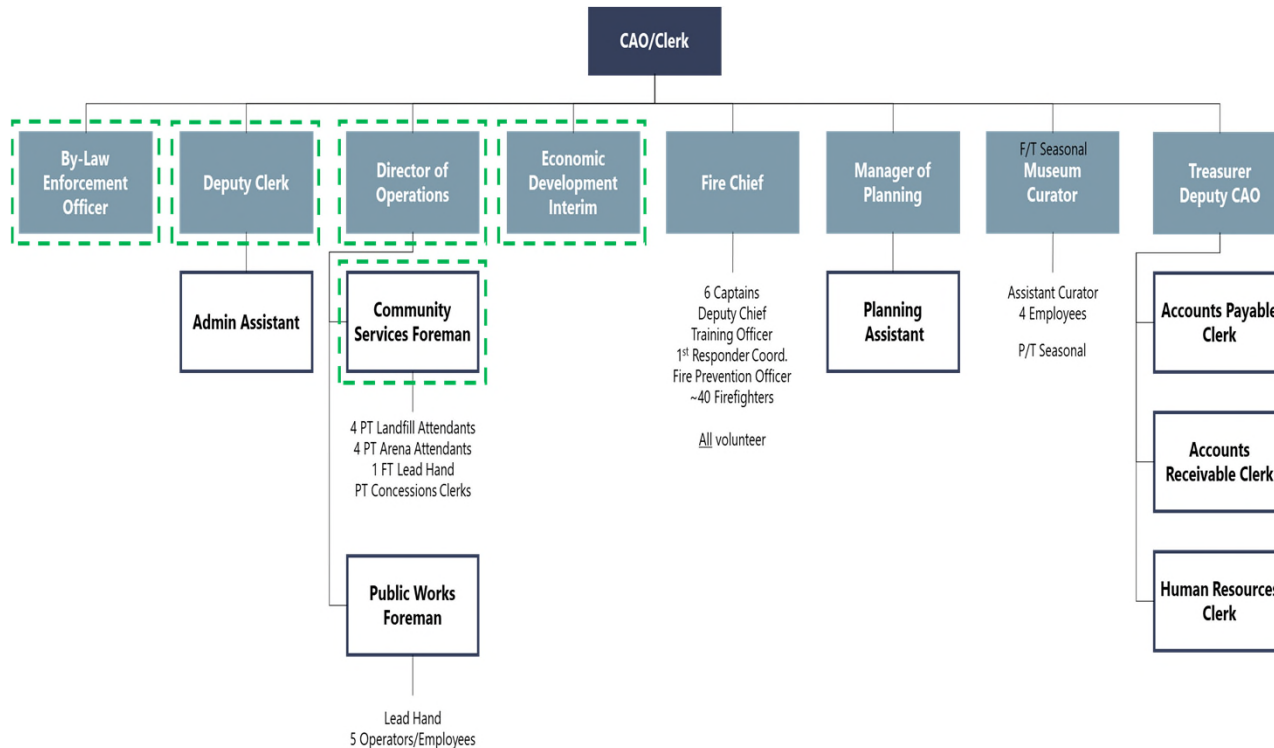
Observations

1. **Economic Development** is under the mandate of the CAO role, with intern support.

2. **Deputy Clerk** supports the CAO/Clerk without having their own operational portfolio.

3. **By-law enforcement** is charged with the enforcement of non-criminal by-laws.

4. **Public works and community services foreman** resources are located within the Operations function. The Municipality of Oliver Paipoonge has two municipal community halls.

5. Fire Services has a dedicated **Training Officer support function.** Administrative and education duties are split between 6 Fire Captains, a Deputy Chief, a Training Officer and a Fire Prevention Officer.

6. **Planning** is a dedicated functional area with no notable cross over in other areas.

7. **Human resources** is located within Treasury.

Mattawa's CAO has a similar span of control (6:1) and asset management falls under the mandate of the Finance function. Like other municipalities reviewed, Mattawa allocates by-law enforcement to the Chief Building Officer. Additionally, recreation and facilities responsibilities are located under a separate unit.
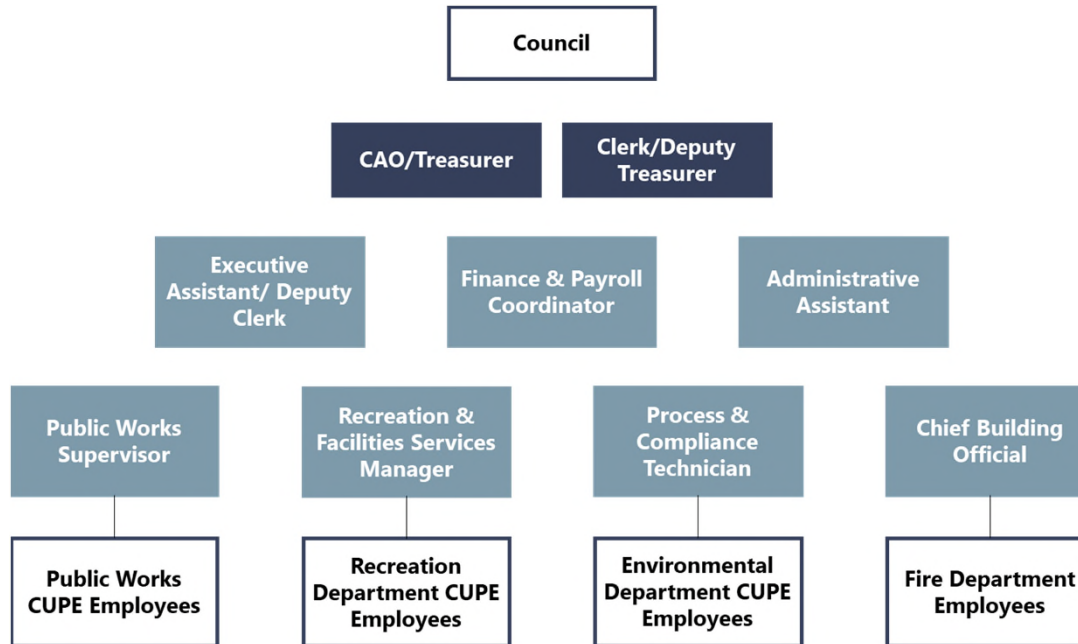
Observations

1. CAO has a dual role as Treasurer supported by a **Deputy Treasurer and Executive Assistant**.

2. **Asset management** falls under the Finance Function

3. **Deputy Clerk** responsibilities rest with the EA role.

4. **Chief Building Officer is responsible for by-law enforcement,** parking, dogs, fence permits, property standards, emergency preparedness.

5. **Public Works** is a separate function to Recreation and Facilitates Services. Recreation and Facilitates Services function include **children, youth and family programming and arena management.**

6. **Garbage, recycling, landfall responsibilities** fall under the mandate of the Environmental Services function.

Economic Development Partnerships

- A downturn in the forest industry forced Mattawa to reconsider its economic development strategy. Mattawa banded together with four neighbouring municipalities to form the Mattawa Bonfield Economic Development Corporation (MBEC) which is funded by Innovation, Science and Economic Development Canada grant.
- Led by five mayors and an Economic Development Officer, MBEDC focuses on supporting community and economic development for the 6000 residents of Mattawa, Bonfield, Papineau-Cameron, Mattawan and Calvin.

Point Edward's CAO has a slightly smaller span of control to Shuniah (6:1). With a small geographic area of coverage, some services (e.g., 911 police services and fire dispatch) are delivered by the provincial government. The community centre and arena is supported by Facilities and Recreation Foreman and a Recreation Programming Assistant. Like other municipalities, the CAO benefits from administrative support. Point Edward purchases building permit services from other municipalities on a fee-for-service basis.*

The Village is served by the following Committees:
- Public Works/Parks
- Arena/Community Hall
- Fire
- Water/Wastewater
- Finance
- Police Services Board
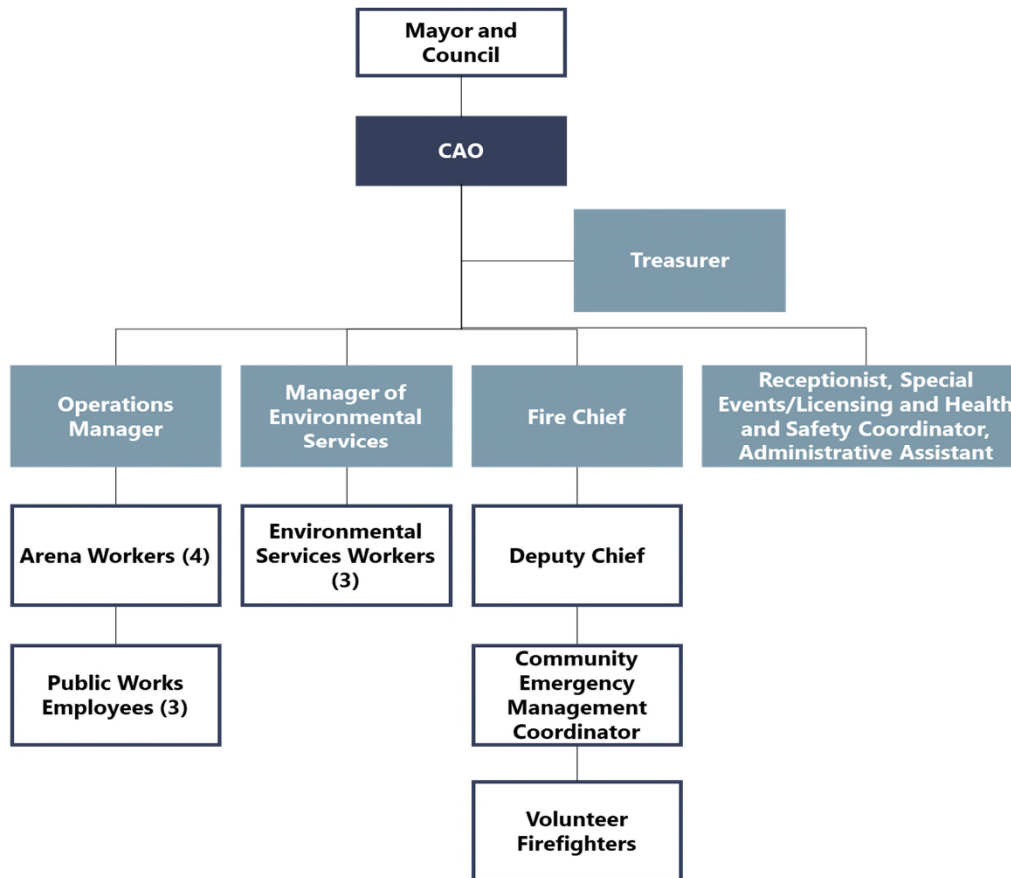
Observations

1. **CAO** is responsible for treasury with administrative assistant support.

2. **Economic development** is part of the planning function's mandate.

3. **By-law enforcement** is part of the Chief Building Official's mandate.

4. **Facilities and recreation foreman** duties are under the mandate of the operations function.

5. Community centre / arena is supported by a **administrative and programming recreation assistant** role.

Note: Municipalities included in this service agreement include: Brooke-Alvinston, Dawn-Euphemia, Enniskillen, Oil Springs, Petrolia, Plympton-Wyoming, Point Edward, St. Clair, Warwick

Central Manitoulin's CAO function has the widest span of control at 9:1. Similar to Oliver Paipoonge, the CAO has Clerk responsibilities with the support of a dedicated Deputy Clerk role. Like Shuniah, the Treasurer has a dual responsibility of Deputy Clerk. Most notable is that non-criminal by-law enforcement rests with the Chief Building Officer, which is an emerging theme across the municipalities examined. Roads Department maintains over 440 lane kilometres of roads.
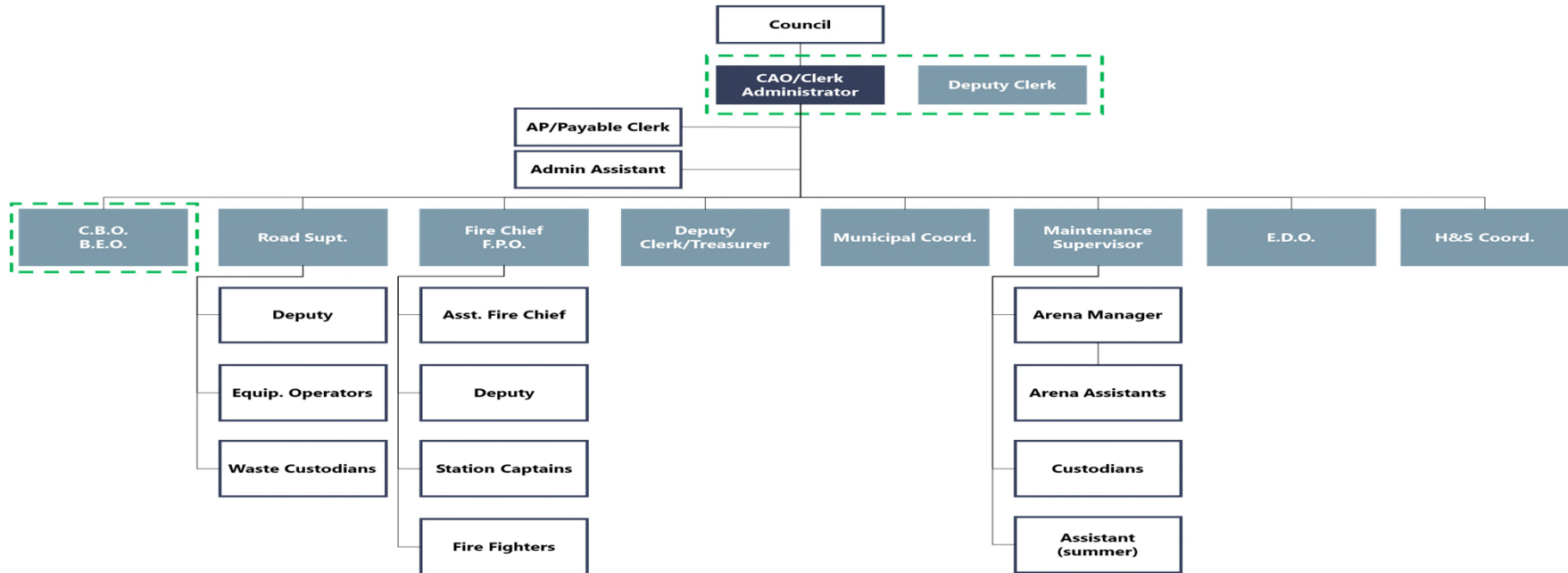
Observations

1. **Clerk** responsibilities rest with the CAO with the support of a Deputy Clerk.

2. **Economic Development** function reports directly to the CAO.

3. **By-law enforcement** responsibilities are under the mandate of the Chief Building Officer function.

4. **Roads and municipal maintenance** are separate functional areas.

Fire Services Comparisons

Shuniah operates 3 fire halls staffed by a Fire Chief and 35 volunteers. Fire services provides coverage to 2,130 households within 570.99 km^2 with an operating expenditure of $530,913 in 2019.

Municipality	Operating Expenditure	Coverage (Land Area / Population)	# Fire Stations
Shuniah	$530,913	570.99 km^2 / 2,798	3
Lake of Bays	$672,426	671.5 km^2 / 3,167	4
Oliver Paipoonge	$382,645	350.3 km^2 / 5,922	6
Central Manitoulin	$457,550	431.11 km^2/ 2,084	3
East Ferris	$375,041	149.8 km^2 / 4,750	2
Point Edward	$1,397,556*	3.27 km^2 / 2,037	1
Mattawa	$780,044*	3.66 km^2/ 1,993	1

Note: Point Edward and Mattawa's operating expenses for fire services are not directly comparable as the Fire services budget information is part of a broader Protection Services budget that includes police services etc.

Future State
Recommendations

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An optional future state organizational structure has been designed based on the functional requirements of the municipality as defined by current and future needs. This structure is aligned to Shuniah's broader strategy and has the potential to enable the municipality to add value to satisfy the future growing residential needs. The rationale behind this design is explained in the next slide.

- ✓ Economic Development Strategy
- ✓ Vendor / Contract Strategy
- ✓ Succession Strategy
- ✓ Continuous improvement

Legend

- Optional Role Changes
- Modification to Existing Roles
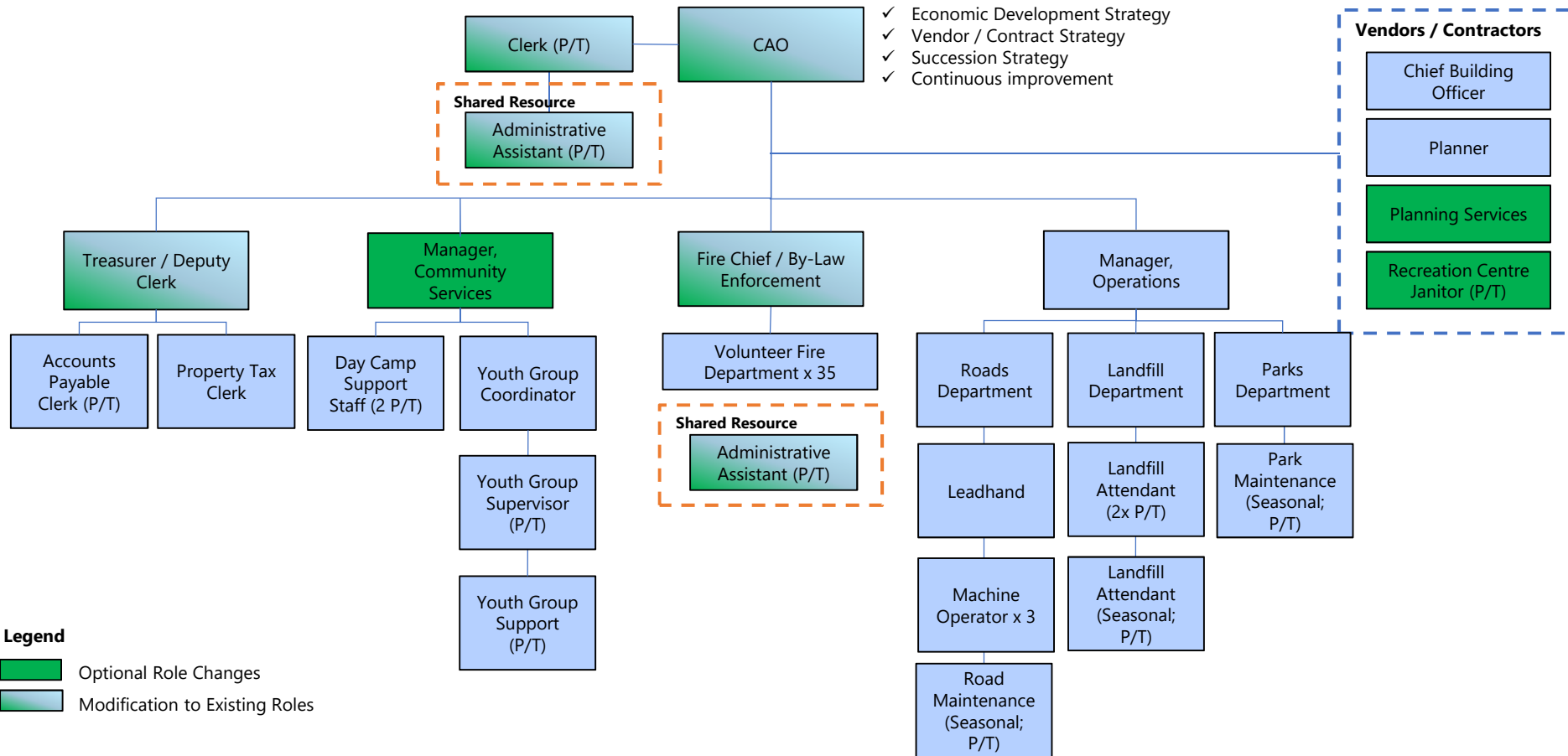
Manager, Community Services new role is dependent on the volume demand for future recreational programs; this should be articulated within the new strategic plan

Optional recommendations for future organization structure (5-year plan)…

1. **CAO to focus on Shuniah's more strategic priorities** to ensure a sustainable organization into the future. Strategic level activities include economic development, vendor / contract strategy, succession planning strategy, and continuous operational improvement.

2. **Clerk role to focus on clerk responsibilities,** assist with some planning duties as it relates to the outsourcing of municipal planning services and provide key administrative support to the CAO.

3. **Administrative assistant role** to function as a direct report to the Clerk's Office (clerical duties, planning administration as required) and shared resource for the CAO and the Fire Chief (volunteer and training program coordination)

4. **Manager, Community Services and Recreation Centre Janitor**. These areas have the potential to experience accelerated growth in the future and may require dedicated roles to ensure that business needs are met and to support extended events and programming. The requirement for these roles should be evaluated and prioritized in the future based on the evolving residential needs and the strategic direction of Shuniah.

5. **Modification to Existing Fire Chief role** to include the removal of building code related bi-law enforcement from the mandate.

6. **Mid to high level complexity planning services could be outsourced** to an external vendor while repetitive less complex planning administration could be managed by the Clerks Office.
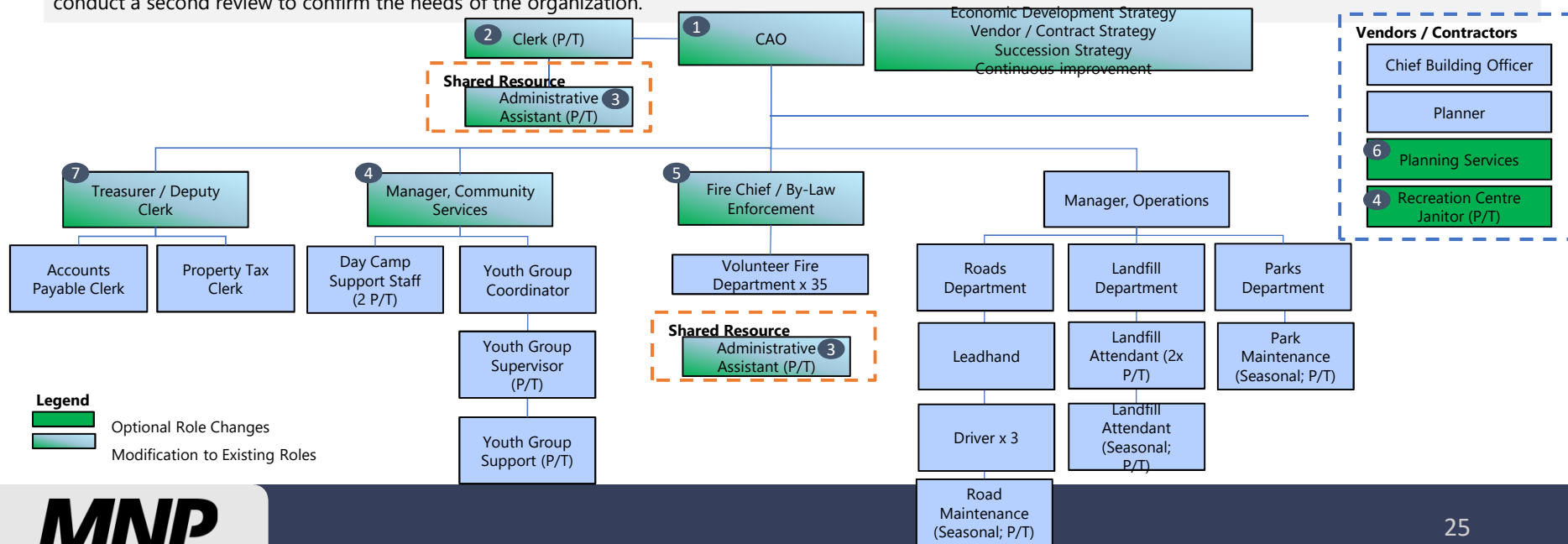
7. **Treasurer / Deputy Clerk** to increase scope of work to include economic development support including grant identification and proposal development.

These role recommendations are not necessarily net new positions, but rather a reflection of the division of functional responsibilities to position the municipality for success into the future. Given the changing nature of the external market, which impacts business decisions, we recommend that at the 3-year point, Shuniah should conduct a second review to confirm the needs of the organization.

Organizational Chart:

- 2 Clerk (P/T)
- 1 CAO
  - Economic Development Strategy
  - Vendor / Contract Strategy
  - Succession Strategy
  - Continuous improvement

Shared Resource
- 3 Administrative Assistant (P/T)

Vendors / Contractors
- Chief Building Officer
- Planner
- 6 Planning Services
- 4 Recreation Centre Janitor (P/T)

- 7 Treasurer / Deputy Clerk
  - Accounts Payable Clerk
  - Property Tax Clerk
- 4 Manager, Community Services
  - Day Camp Support Staff (2 P/T)
  - Youth Group Coordinator
    - Youth Group Supervisor (P/T)
      - Youth Group Support (P/T)
- 5 Fire Chief / By-Law Enforcement
  - Volunteer Fire Department x 35
  - **Shared Resource** — 3 Administrative Assistant (P/T)
- Manager, Operations
  - Roads Department
    - Leadhand
      - Driver x 3
        - Road Maintenance (Seasonal; P/T)
  - Landfill Department
    - Landfill Attendant (2x P/T)
    - Landfill Attendant (Seasonal; P/T)
  - Parks Department
    - Park Maintenance (Seasonal; P/T)

Legend
- Optional Role Changes
- Modification to Existing Roles

Operational Improvement

The key operational areas below have been identified as immediate opportunities for improvement that will support the municipality into the future. These key areas have a cross departmental reach and impact and are described in detail in this section of the report.

OPERATIONAL AREA		OUTLINE OF IMPROVEMENTS	
1	Cultural Change	1	Cultural change can be achieved by investing efforts in team building, enhancing communications, building trust and support within and across departments.
2	Role Clarity	2	Documenting job descriptions and performance KPIs to reduce overlap and reduce duplication and gaps in services.
3	Communication and Reporting	3	Improve organization wide communications to promote a stronger, more engaged team.
4	Succession Planning	4	Begin succession planning to reduce risk and create smooth transitions.
5	Management Training and Development	5	Provide management team training in leadership skills to improve staff.
6	Issues Management	6	Develop clear protocols to address issues arising both internally and from residents.
7	Technology	7	Implement Customer Relationship Management (CRM) software to improve service delivery and decision making.

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Implementation Plan

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The recommendations contained in this report are not significantly complex. As such, upon approval of the recommendations, with focussed effort the organizational changes could be completed within a six month time frame, with ongoing monitoring and continuous improvement to follow. Only recommendations related to technology selection and implementation will likely require additional study (a more fulsome business case) and more effort to implement.

2020

March	April	May	June	July	August	Sept	Oct	Nov	Dec

Approval of changes

Update job descriptions:
CAO   Treasurer
Clerk   Fire Chief

CAO: enhanced strategic focus – economic development, succession, vendor strategy

Treasurer: Responsible for economic development activity

Fire Chief: Removal of building code enforcement

Clerk: transition to less complex planning mandate and planning vendor management

Create new job description: Manager Community Services

Recruit Community Services Manager

Onboard Community Services Manager

Detail scope of outsourced planning function

Source and sign agreement with planning vendor/resource

Transition technical planning to vendor, less complex to Clerks office

Adjust working hours of existing Admin Assistants and/or recruit additional AA

Develop and implement updated meeting / communication mechanisms

Identify and implement management and leadership training required

Develop business case for Customer Relationship Management technology

Software selection

Software implementation and roll out

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Implementation Communications

To support a seamless implementation ongoing communication with staff, management, Council and stakeholders will be an important element. In designing a communications plan, consideration must be given to how any change will impact each person or stakeholder group.

Timing	Stakeholder Group	Mechanism / Key Messages
Upon approval of changes	Impacted staff	• Overview of upcoming changes and timing of change for impacted individuals should be communicated one-on-one to indicate the new/revised expectations of the role. Allow the opportunity to respond to questions
	All staff	• Overview of upcoming changes should be communicated through an all staff meeting to ensure common messaging and provide all staff the chance to ask questions about the upcoming change and impact on their role. Be clear on the benefit of the change. • Communicate if any impact on services is expected and allow staff to provide their insight into potential changes to operations
Throughout implementation	Impacted staff	• Any new role may require training, whether formal training or simply related to new expectations. Ensure the avenue for ongoing communication related to new responsibilities is available. • Ensure ongoing communicate about the progress on change that will impact their role to allow staff to adjust and plan accordingly
	All staff	• Maintain regular communication with all staff on changes, either through e-mail or all staff meetings. Focus on the benefits of change • Continue discussion related to the impact on roles. Although specific roles may not change, the way they do their job may change.
	Council	• Ensure continuous communication on the status of the change. Identify any potential risks and provide mitigating action. Communicate any impact on service delivery (level of service, mechanism for service delivery, etc.)
	Citizens	• Any change in service levels or process to access services must be communicated to the residents of Shuniah to allow for a smooth transition.

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Culture is made up of its employees shared values, beliefs, and behaviours. The most visible element of culture are keystone behaviours. Shuniah requires a shift in culture to gain alignment and improve inter-personal relationships between and within departments. Based on our observations, we have identified four priority behavioural competencies that can support Shuniah's operations and service delivery. To support this change, certain cultural improvement tactics can be deployed to support and reinforce priority behaviours outlined below. An important aspect is to focus on one or two critical behaviours at a time, as trying too much will dilute the message and will reduce effectiveness.

Proposed Behavioural Competencies

Client-centric

Collaboration

Communication

Solution-focused

A Consistent Service Delivery Experience

Creation of a "Service Experience Vision" to provide clarity regarding what the staff and public should expect in their municipal interactions. This can serve as a guide for service standards to ensure alignment with expectations and a consistent service delivery experience.

Enhanced Communications

Implement regular, all-staff meetings to bring the full team together to better acquaint staff from different departments and ensure consistent messaging and updates are presented to all departments. Increased frequency of communications will enable a more connected and flexible service delivery and collaboration between departments to increase efficiency and utilize resources appropriately.

Service Standards and Performance Measures

Development of service standards and performance measures that will provide greater transparency in terms of expectations and guidance in meeting mandates, while also taking into consideration alignment with the Service Experience Vision.

Feedback and Improvements

Implement forums to gather feedback from departments regarding their resource requirements to enhance collaboration both between and within departments who may have additional capacity or resources to support.

Cultural Change (2/2)

A focus on core behaviours during high impact moments / interactions that matter to employees and the public can be used as a leverage point to shift behaviours and build, strengthen and reinforce cultural change. The organizational system acts as a driver that reinforces the desired behaviours.

❶	❷	❸	❹	❺
Confirm Alignment on Vision, Strategy, Business Priorities, & Desired Change	**Assess Gap Between Current & Desired Behaviours**	**Audit the Key Drivers of the Desired Behaviours**	**Design & Implement Targeted Interventions to Change the Drivers**	**Monitor Interventions, Behaviours & Performance to Continuously Improve**
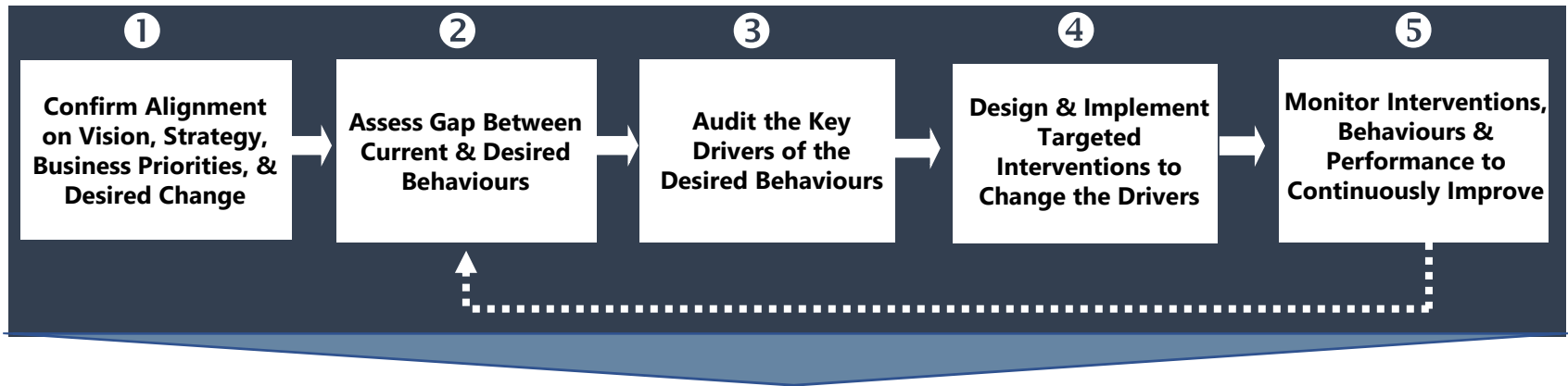
Institutional Leadership	• Articulating the desired change, role modelling behaviours, and providing rewards / sanctions that reflect living the values of the organization
Management Practices	• Expressing clear performance expectations • Changing own behaviour with direct reports and peers to reflect/promote new culture • Impacting large numbers of people
Organizational Context	• Structure and work processes • HR policies and practices including performance management • Communication
Individual Behaviour	• Changing behaviours of key players e.g. informal leaders, opinion leaders • Influencing the broader team through key players

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Clarification of Roles & Responsibilities

During our review, we found that the responsibilities of certain roles within the municipality overlapped (i.e., the CEDO and the Recreation Co-ordinator). The table below outlines the recommended actions that should be taken regarding the clarification of roles and responsibilities that will help to eliminate role overlap or duplication, reduce confusion and improve service delivery efficiency.

Recommendation	Actions
1. Update Job Descriptions	*The implementation of clear job descriptions will result in a greater alignment between management and staff and there will be improved coordination within the municipality.* 1) Define the roles and responsibilities associated with each job 2) Note any measures to track and evaluate performance (KPIs) within each role to provide clarity in expectations 3) Identify departments that each role collaborates with and implement the appropriate communication channels between these roles to enable effective collaboration
2. Adopt a RACI Matrix	*A Responsibility Accountability (RACI) Matrix is a tool to outline the roles for who is responsible, accountable, consulted and informed for each element of a project. A RACI matrix will help to improve coordination within the municipality and will allow staff to focus on their core responsibilities, enhancing efficiency.* 1) Define all the tasks associated with each project or job undertaken by the municipality 2) Outline the roles of all the team members who are involved with the project and assign tasks to each team member based on whether they will be responsible, accountable, consulted or informed for that task 3) Communicate the matrix with the team members involved to ensure clarity and transparency regarding their role within the project and how their role relates to the other roles involved, improving coordination
3. Monitor Job Responsibilities Over Time	*Monitoring the tasks completed by each role over time will ensure that staff are adhering to their responsibilities and any overlap between jobs can be identified. This will further enhance coordination between roles and highlight synergistic functions to improve effectiveness, especially in developing a more cohesive approach to community initiatives (i.e. recreational activities). It can also lead to cost savings if redundant functions are identified or if some positions can be made part-time.* 1) Have staff track their day-to-day activities and assess whether the duties of staff are aligned with their job description 2) Reassign tasks or update job descriptions if necessary 3) Identify overlapping tasks, redundancies, and opportunities for synergistic functions depending on the tasks performed to improve effectiveness and make any necessary changes (i.e. shift responsibilities, hire new staff etc.)

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There is a significant opportunity to improve communications across the municipality. Formal communication pathways are not clearly defined and are causing confusion internally which is impacting service delivery. Active participation in meetings should be viewed as a core responsibility of all to act in the municipality's best interests. The quality of management reports to Council is also an area of improvement that is required across the Operations, Fire and Emergency Services, and Planning departments.

Elements of an Effective Communications Plan

Staff Involvement

Understanding

Leadership Driven

Staff and residents have visibility and clarity about their role within the municipality, are committed, and are ready to work with the new communication model.
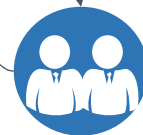
Staff feel supported, enabled and understand how the new communications model will support their role and how to leverage its full potential to share information and manage human and financial resources

Managers are the visible / vocal sponsors and make the change real for their departmental teams with daily role modeling.

Effective communication and accurate reporting is critical to enabling a high performance team and seamless and informed decision making. Shuniah could benefit from investing in improving this area across all facets of the organization. Below are some specific recommendations for the municipality:

Vehicle	Description	Frequency	Sender / Messenger	Audience
Internal Management Meetings	• Department Managers should meet to discuss updates from within their department, their current capacity and resource requirements, and opportunities for assistance from other departments to enable greater coordination, collaboration and planning across departments.	Bi-Weekly	• CAO	• Department Managers
All Staff Meeting	• Following council meetings and internal management meetings, All Staff Meetings should be held with all staff to communicate important updates and changes within the municipality, including staff and leadership changes. This will help to align staff on priorities to improve service delivery. This will also provide a platform to bring the full team together to enhance engagement and inter-personal relationships.	Bi-Monthly or Quarterly	• CAO	• All staff
Department / Team Meetings	• Department Managers should meet with staff to provide updates and information regarding upcoming projects or changes. Staff can also voice their ideas and contributions. This will facilitate more effective communications at the department level.	Monthly	• Department Managers	• Managers and staff within departments
Municipal Email	• An organization wide email should be used to communicate municipal and departmental updates, meeting information, and information about staff (leadership and staff changes, life updates) to enhance engagement, enable resource sharing and improve culture.	Ongoing	• All Staff	• All Staff
Municipal Website	• A website will provide a platform to enhance engagement with residents. Municipal updates can be posted, as well as information and booking for recreational activities. There can also be CRM system to collect feedback and complaints.	Ongoing	• CAO • Manager of Community Services	• Staff • Municipal Residents
Management Reports	• Improved quality of management reports including more timely budget updates to improve department planning.	Quarterly	• CAO • Department Managers	• Council Members • Department Managers

It is apparent that critical management roles lack "ready now" talent so the development of a formal succession planning process should be established. Identification of critical future leadership expectations (e.g., skills, knowledge, and behavioural competencies) to guide the succession planning process, as well as a management team that understands and is committed to the system will be central to this process. Succession planning will also create developmental opportunities for growth to ensure effective and sustainable service delivery.

Proposed Development for a Succession Planning Program

Recommendation	Activity Requirements
Create a Clear Vision of Leadership Expectations	*A clear leadership expectations vision is created and aligns with the creation of development activities and a selection of "ready now" talent. This will help strengthen the alignment between municipal goals and individual performance objectives, while also improving municipal performance through continual reinforcement of desired behaviors and expectations.* 1) Appropriate stakeholders for meeting(s) are determined and the purpose of the meeting(s) is established 2) Discussions around future leadership expectations (e.g. as related to department needs in the future) are initiated 3) High-level discussions around what knowledge and skills will be necessary for the above expectations are held
Develop a Semi-Structured Mentoring Program	*Department leaders and employees participate in a collaborative semi-structured mentoring program that integrates developmental and career path discussions. This will increase leadership involvement in employee development to get the right people in the right job and will improve engagement by providing ongoing dialogue between leadership, management and staff.* 1) Mentoring is added to the leader's performance agreement 2) Leaders select individuals to mentor and develop 3) Leader has ongoing conversation with mentees and investigates mentee's desired career goals
Develop a Formalized Succession Planning Process	*The succession planning process will enable the current and future deployment of the municipality's talent and will assist in retaining critically important employees who might otherwise leave. This process will also establish a strong foundation for performance consistency and alignment.* 1) Management teams agree upon talent discussion timelines, agendas and outcomes 2) Timelines will coincide with performance management cycles and outcomes integrated with creation of development programs and mentoring processes 3) HR team facilitates both discussions, then determines proper support, including communication plans, data reports, facilitation efforts and integration of outcomes into other Talent Management processes

A consistent theme that emerged across the majority of interviews was the need to strengthen communications and coordination of activities across the departments. This directly impacts service delivery to citizens and creates and confusion inefficiencies internally. Shuniah's management team would benefit from strengthening competencies and skills that are relevant to their roles.

Communication is foundational to motivate, influence, delegate, inform, provide feedback and teach staff. This will provide an integrated leadership development solution for the team that enables improved team effectiveness and empowerment of staff to support Shuniah's short and long-term objectives and priorities.
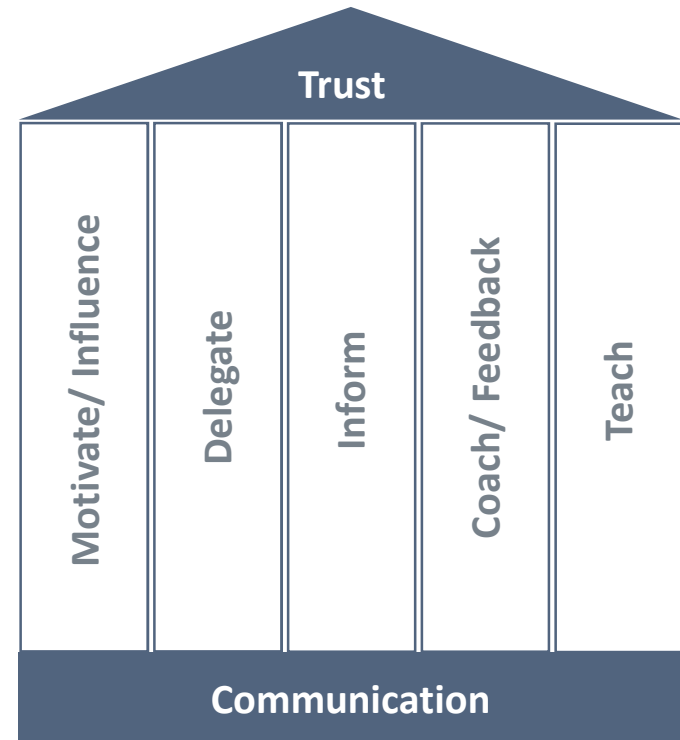
Issues Management

Given the size of the municipality, it is both practical and reasonable that issue management involves multiple individuals. Nonetheless, there is an opportunity to introduce clear protocols to enable more effective coordination and service delivery in certain areas to help manage expectations with residents (e.g., front desk queries, by-law enforcement, planning, and complaints resolution).

From: *A more decentralized, reactive, and delayed approach*

To: *A more transparent, digitally focused, customer orientated and proactive approach*

Current issues management approach is characterized by:

- No shared understanding as to how or who manages and responds to planning queries

- Collaboration and communication challenges that hinder the ability to tap into the collective resources to deal with resident queries and complaints

- Structure and processes that result in the assignment of issues to departments that may not have the time and resources to deal with the issues (i.e. Fire)

Future issues management approach is characterized by:

- A cohesive and coordinated service delivery that is more digitally focused and client centric, including CRM software and a FAQ page for common queries

- A strong culture grounded in collaboration and open communication within and across the municipal departments to better coordinate and track resolutions

- A municipality whose staff, managers and leaders are empowered and enabled to improve productivity and innovate to proactively manage issues, thus enhancing service delivery levels and standards

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Technology

It emerged from our consultations that existing systems are not leveraged to their maximum utility. A Customer Relationship Management (CRM) system would benefit staff to track and monitor queries from the public. Additionally, as demand for the recreation centre is likely to increase, it would be beneficial to establish an online booking system through the Shuniah website. Shuniah should also leverage its CGIS system more effectively to formally track queries and gather data.

The utilization of these systems and the integration of various data sources will help to optimize operations, improve service delivery and will lead to more accurate reporting and analytics.

Implement CRM

Current State:

- Lack of an online booking service for facilities and recreational activities
- Delayed information sharing regarding recreational programs and municipal events
- Unknown demand for recreational programs and the resources required to implement the programs offered

Technology to Implement:

- Client Relationship Management (CRM)

Outcomes:

- Easier for young families and residents to register for recreational programs resulting in increased demand for programs and related revenues
- Higher turnout at municipal events and increased utilization of facilities
- Higher resident satisfaction of municipal service delivery

Reporting & Analytics

Current State:

- Paper-based system for municipal reports to council
- Lack of visibility regarding what information is being presented to council about municipal operations
- Information delay in reporting resource and financial requirements to council

Technology to Implement:

- Utilization of CRM and CGIS

Outcomes:

- Ability for all departments to provide information to the council, increasing visibility as to what information is shared
- More efficient and timely sharing of financial budget information to allow departments to manage their financial requirements

Vendor Management

Given that we have presented a recommendation for the outsourcing of mid-to-high level complexity planning activities; a more strategic means of approach and maintaining vendor relationships will need to be part of the CAO's portfolio to ensure a service delivery experience that is consistently excellent.

Vendor management enables successful management of outsourced planning service providers. The practice of dealing with multiple independent contracts can be time consuming and create risk. Moving forward, Shuniah should consider the sub-dimensions below to effectively manage the vendor relationship for outsourced planning services.

Sub-dimensions		Leading Practice Behaviours
Sponsorship	• What level of sponsorship exists for the relationship?	• **Executive sponsorship**, up to council level if appropriate, is in place for critical supplier relationships
Strategic alignment	• Does the contract and relationship reflect Shuniah's stakeholder objectives?	• **Stakeholders involved** in the planning process are actively engaged and contribute to the development of requirements • **Future requirements** are considered and, where possible, planned for in the contract • **Municipal objectives are understood,** clearly stated and related to the contract, supported by specific terms and conditions where relevant
Balance	• Does the relationship balance the needs of the municipality and those of the vendor and achieve a outcome beneficial to both?	• **Active dialogue around driving further benefits** from the relationship occurs between the municipality and the vendor • **Incentivization of the delivery of additional value** through the life of the contract with clearly defined mechanisms
Review	• How often do reviews with stakeholders occur and do they involve the vendor?	• **Formal 'Reviews' between the municipality and the vendor are conducted** at an appropriate frequency against a formal agenda that covers performance, risk and value • **Identify a 'relationship manager'** between the vendor and provides continued link with key stakeholders

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Effective Governance of the Vendor Relationship

If the municipality chooses to outsource planning; effective governance of the vendor will be key to managing risk, performance and value. This would be a significant change for Shuniah and effective vendor relationship management will be critical to success. Key oversight processes are central to managing risk and delivering ongoing value .

MANAGE PERFORMANCE
- Performance Assessment and Reporting
- Service Level Review and Business Alignment
- Service Request and Change Management

STAKEHOLDER RELATIONSHIP
- Stakeholder Relationship Management
- Stakeholder Satisfaction Management
- Stakeholder Communications Management

MANAGE FINANCIALS
- Financial Planning & Forecasting
- Financial Reporting
- Vendor Market Comparison & Benchmarking
- Vendor Invoice Verification Management

GOVERNANCE

MANAGE THE PROGRAM
- Issue and Risk Management
- Benefits Realization Management
- Portfolio Health Check
- Policy and Standards Compliance Management

MANAGE THE AGREEMENT
- Agreement Administration
- Agreement Change Management
- Agreement Compliance Management
- Agreement Clarification Management

MANAGE VENDOR PORTFOLIO
- Vendor Profile Maintenance and Communications
- Vendor Contract On/Off Boarding Management
- Portfolio Segmentation and Planning

Organizational Change

As aligned with the recommendation in this report, the organizational design for the Municipality of Shuniah requires only small modifications to enhance service delivery and align with future plans and growth.

The table below outlines the implementation activities related to each function.

Function	Implementation Activities
CAO	- Update job description - Develop appropriate strategies to clarify economic development strategy, vendor management, etc. - Identify and attend leadership training for the leadership team
Clerk	- Define planning activities to be outsourced, clarify requirements and identify and procure outside vendor - Update job description to focus on Clerk role, less complex planning activities, planning vendor management and other administrative duties to support the CAO
Treasurer	Update job description to include economic development support, including identification of grants and proposal development
Community Service	- Develop a job description for this new role to combine recreational services with community services responsibilities - Recruit for position - Recruit for a Recreation Centre janitor
Fire and Emergency Services	Define requirements for and add administrative support for Fire Services

Municipality of Shuniah

Presentation of Findings

Compensation Review Report

October 15, 2019

Compensation Report Overview

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The Municipality of Shuniah ("Shuniah") has engaged MNP to conduct a compensation review for their management team. The following steps were taken by MNP to conduct the review:

| **Step 1:** Develop and Administer Survey Tool | **Step 2:** Collect and Tabulate Data | **Step 3:** Review and Assess Data | **Step 4:** Develop Key Considerations Based on Findings |

In order to gather comparator information, a compensation benchmark survey was conducted with the participation of five municipalities that are similar in size, location, organizational structure, and/or operating conditions. The purpose of the survey is to ensure that Shuniah is able to remain competitive in order to retain top talent, while also managing resources in an efficient manner.

The survey aimed to gather the following information:
- Understanding compensation philosophy;
- Identifying role equivalents in comparator organizations;
- Identifying responsibilities and accountability;
- Developing base salary ranges; and
- Any additional forms of compensation.

> Outlined in this report are key findings based on the compensation and benefit information shared by comparator organizations in the survey. Additionally, key considerations are provided for Shuniah to consider regarding compensation and benefits moving forward.

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Note: To maintain the confidentiality of participating organizations, MNP has analyzed and reported the results of the survey in aggregate form with no attribution to named organizations.

Step 1: Develop and Administer Custom Survey Tool

MNP developed an online custom compensation survey to collect information for seven (7) Shuniah management positions:

1. Chief Administrative Officer (CAO)
2. Operations Manager
3. Planning Manager/Clerk
4. Treasurer/Deputy Clerk
5. Fire Chief/Municipal Law Enforcement
6. Community Services and Economic Development Officer
7. Recreation Coordinator

Step 2: Collect and Tabulate Data

The custom survey collected the following information from comparable organizations:
- Organizational demographics;
- Compensation philosophy;
- Brief descriptions of comparable jobs (to ensure comparable scope of responsibility and accountability); and compensation offerings (base salary, group benefits and additional compensation information).

Of the 10 comparator organizations invited to participate, a total of 5 organizations provided responses:
- ✓ Municipality of Oliver Paipoonge;
- ✓ Municipality of Markstay-Warren;
- ✓ Municipality of French River;
- ✓ Township of Lake of Bays; and
- ✓ Village of Point Edward.

Step 3: Review and Assess Data

Survey results have been organized in 3 sections:
1. Participant profile;
2. Pay Philosophy, accountability and salary results; and
3. Group benefits and additional compensation.

Step 4: Develop Key Considerations Based on Findings

Shuniah's compensation data was compared to with the comparative compensation packages and a summary of the key considerations is presented. Key compensation program best practices have been considered and included as part of this report to further support Shuniah.

Participant Profile and Pay Philosophy

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Participant Profile and Pay Philosophy

- As part of the compensation review, MNP compared the following municipalities, townships, and villages with Shuniah, as outlined in the table below. Each organization was selected based on their demographic similarities in key areas.

Municipality	Operating Budget	Population	# of Employees	Median Household Income*
Shuniah	**$8,113,188**	**2,130**	**34**	**$96,939**
Lake of Bays	$8,185,025	3,167	34	$69,888
Oliver Paipoonge	$9,452,353	5,922	28	$74,287
Markstay-Warren	$4,800,056	2,656	20	$68,147
French River	$8,103,256	2,662	25	$60,928
Point Edward	$6,582,780	2,037	20	$74,752

Pay Philosophy

- According to survey results, four of five participants aim to pay their managers and employees at the same rate (P50) as comparator organizations.

- One participant responded that their organization aims to pay their managers and employees significantly higher than comparator organizations. (P90)

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Accountability and Salary Results

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Chief Administrative Officer

Key Findings and Observations

Accountability

Direct Reports
Minimum	3
Maximum	9
Average	6
Median (P50)	7
Shuniah	7

Total Overseen Employees
Minimum	20
Maximum	34
Average	25
Median (P50)	23
Shuniah	23

Base Salary

Actual Base Salary Pay
Minimum	$82,981
Maximum	$141,550
Average	$109,693
Median (P50)	$114,586
Shuniah	$109,658

Salary Range Maximum
Minimum	$83,119
Maximum	$153,100
Average	$114,827
Median (P50)	$117,711
Shuniah	$114.088
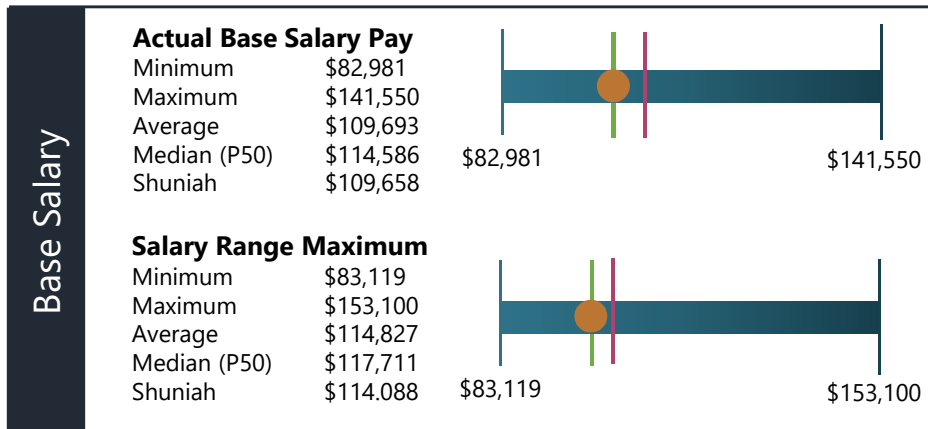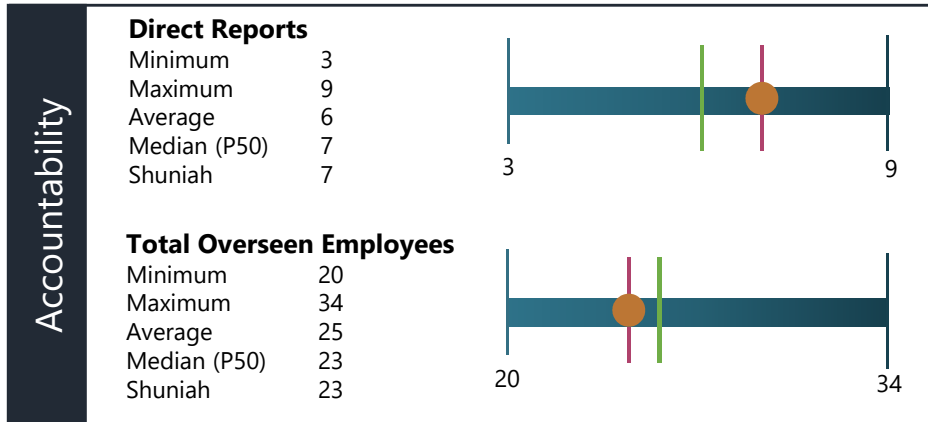
*All salaries have been adjusted to 35 hours per week.

- The majority (4/5) of participants responded that their organization's CAO had similar levels of responsibility (90-110%), while one CAO had significantly more responsibility (110-125%).
- Shuniah's compensation for the CAO ($109,658) falls slightly below the 50th percentile (P50).

- Shuniah's span of control (7:1) was affirmed to be typical for a municipality of this size and fell on the median of comparator organizations.

- Three of five respondents reported that their CAO also serves as Clerk, with another participant's CAO serves as Deputy Clerk.

Legend:
● = Shuniah   ▮ = Median   ▮ = Average

Key Findings and Observations

Accountability

Direct Reports
Minimum	2
Maximum	60
Average	32
Median (P50)	32
Shuniah	35

Total Overseen Employees
Minimum	3
Maximum	60
Average	32
Median (P50)	32
Shuniah	35
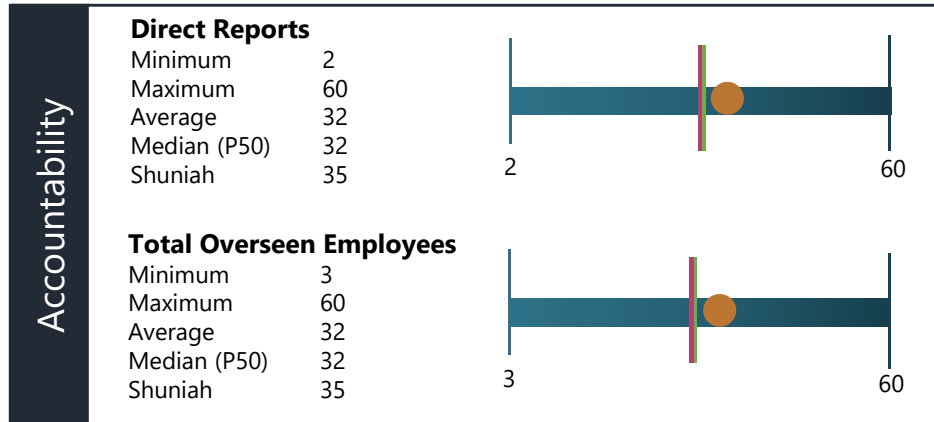
*Volunteer positions are included in above figures.

Base Salary

Actual Base Salary Pay
Minimum	$62,843
Maximum	$101,038
Average	$76,466
Median (P50)	$71,178
Shuniah	$80,081

Salary Range Maximum
Minimum	$65,663
Maximum	$101,038
Average	$78,996
Median (P50)	$72,671
Shuniah	$84,065
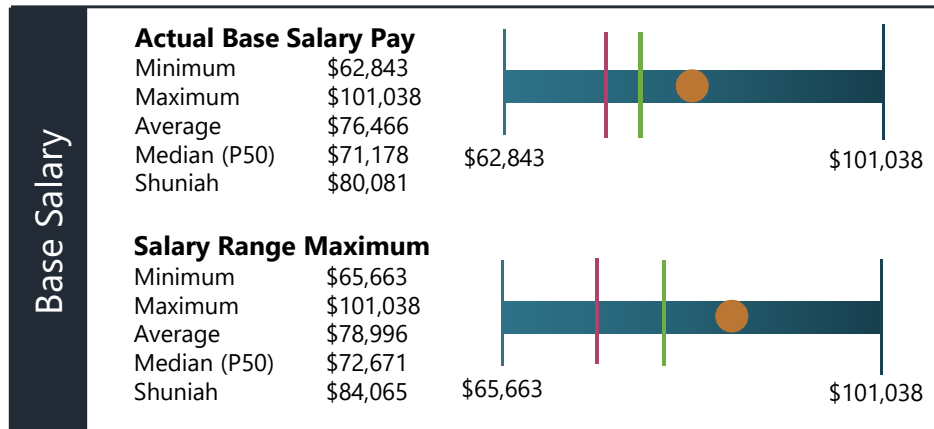
*All salaries have been adjusted to 35 hours per week.

- All participants indicated that their organization's Fire Chief did not carry the responsibility of by-law enforcement. Shuniah's compensation for this role is above the median salary.

- One participant indicated that their Fire Chief role had significantly more responsibility than the role description provided by Shuniah (110-125%). Two participants responded that their Fire Chief had significantly less responsibility (75-90%), one of which had it as a part-time position.

- One participant offered higher compensation compared to Shuniah; which is reflective of their pay philosophy target of 90th percentile (P90).

Legend:
● = Shuniah | = Median | = Average

Key Findings and Observations

Accountability

Direct Reports

Minimum	1
Maximum	11
Average	6.6
Median (P50)	8
Shuniah	8

Total Overseen Employees

Minimum	6
Maximum	15
Average	9.4
Median (P50)	9
Shuniah	8

Base Salary

Actual Base Salary Pay

Minimum	$74,078
Maximum	$94,458
Average	$83,763
Median (P50)	$83,621
Shuniah	$83,686

Salary Range Maximum

Minimum	$74,078
Maximum	$102,166
Average	$85,685
Median (P50)	$85,534
Shuniah	$87,067

*All salaries have been adjusted to 35 hours per week.

- Three of five participants responded that their organization's comparable role had significantly more responsibility (110-125%). Despite this, the qualitative information regarding the roles suggest responsibilities are similar to Shuniah's Operations Manager.

- According to survey results, Shuniah is positioned at its compensation target of the 50th percentile (P50), ensuring a competitive offer for the position.

- Education requirements for this role varied significantly, ranging from high school diplomas to post-secondary engineering degrees and five years of work experience.
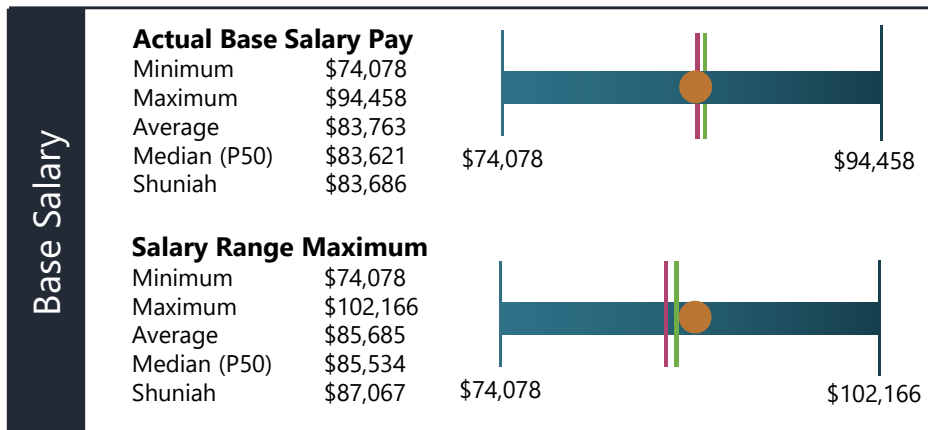
Legend:

● = Shuniah | = Median | = Average

Key Findings and Observations

Accountability

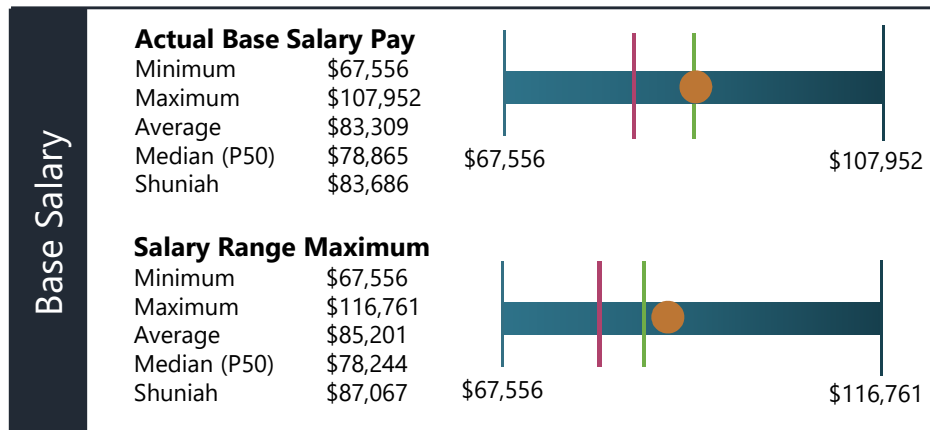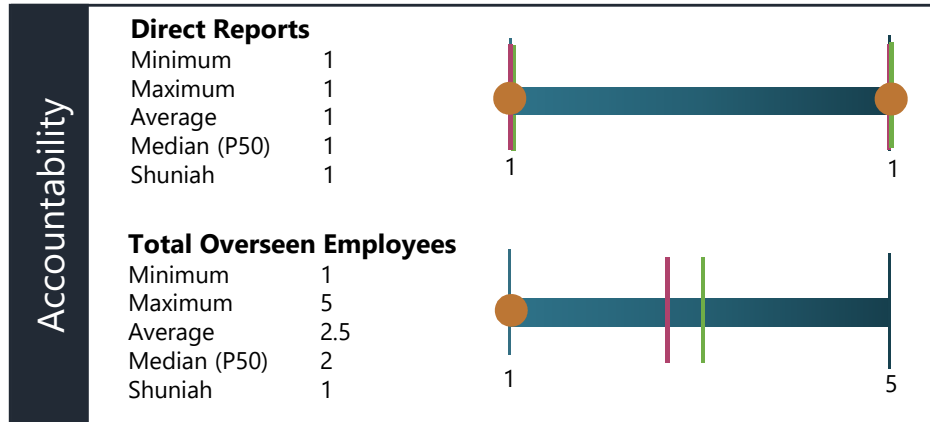**Direct Reports**
Minimum	1
Maximum	1
Average	1
Median (P50)	1
Shuniah	1

1   1

Total Overseen Employees
Minimum	1
Maximum	5
Average	2.5
Median (P50)	2
Shuniah	1

1   5

Base Salary

Actual Base Salary Pay
Minimum	$67,556
Maximum	$107,952
Average	$83,309
Median (P50)	$78,865
Shuniah	$83,686

$67,556 $107,952

Salary Range Maximum
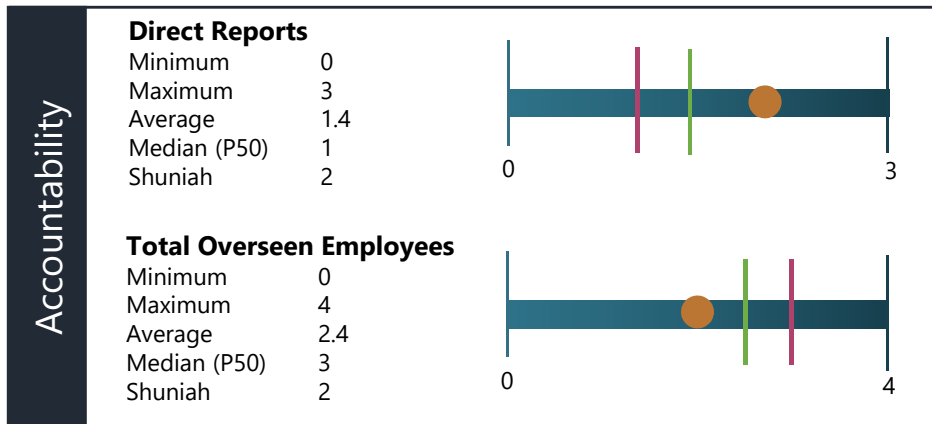|	
Minimum	$67,556
Maximum	$116,761
Average	$85,201
Median (P50)	$78,244
Shuniah	$87,067

$67,556 $116,761

*All salaries have been adjusted to 35 hours per week.

- Two of three respondents indicate that the Clerk and Planning Manager were separate roles and therefore the level of responsibility in comparator organizations was lower than Shuniah (75-90%).

- The participant whose pay philosophy is in the 90th percentile (P90) was the only response to have a higher salary for their comparable position to the Planning Manager / Clerk, which was a more senior level role.

- Some education requirements reported include: a relevant post-secondary education, a professionally recognized planning designation (e.g., MCIP / RPP) and / or a successful completion of the Municipal Administration Program course through the Association of Municipal Managers, Clerks and Treasurers on Ontario.
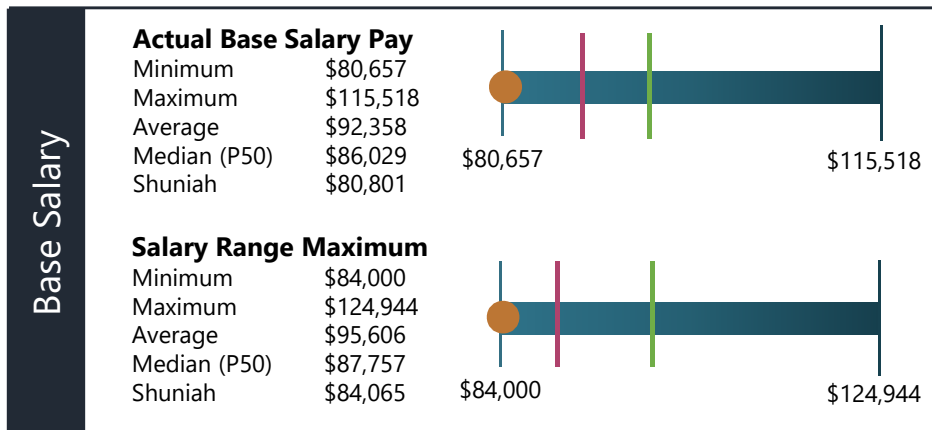
Legend:
= Shuniah | = Median | = Average

Key Findings and Observations

Accountability

Direct Reports

Minimum	0
Maximum	3
Average	1.4
Median (P50)	1
Shuniah	2

Total Overseen Employees

Minimum	0
Maximum	4
Average	2.4
Median (P50)	3
Shuniah	2

Base Salary

Actual Base Salary Pay

Minimum	$80,657
Maximum	$115,518
Average	$92,358
Median (P50)	$86,029
Shuniah	$80,801

Salary Range Maximum

Minimum	$84,000
Maximum	$124,944
Average	$95,606
Median (P50)	$87,757
Shuniah	$84,065

*All salaries have been adjusted to 35 hours per week.

- All participants responded that their organization's Treasurer had similar levels of responsibility (90-110%) to Shuniah. However, Shuniah falls on the low-end of the compensation range when compared with other organizations.*

- Some education requirements provided by comparators include: post secondary education, accounting designation, and completion of the Municipal Administration Program of the Association of Municipal Clerks and Treasurers of Ontario, as desirable,.

Legend:
= Shuniah | = Median | = Average

Note: The participant organization with a pay philosophy in the 90th percentile (P90), skewed the salary range resulting in an average salary that is significantly higher than the median.

Key Findings and Observations

There was insufficient data reported for the Economic Development Officer and the Recreation Coordinator roles. While the results are for these roles are reported below, our recommendation is to interpret this data qualitatively given the limited sample of responses.

Community Investment and Economic Development Officer

- The majority (4/5) of respondents reported that economic development activities are either shared with neighbouring municipalities or the work is done at a regional level.

- One participant staffed an equivalent role with similar responsibilities and compensated the role 10% less than Shuniah's current compensation.

Recreation Coordinator

- The majority (4/5) of respondents did not report on a Recreation Coordinator role.

- One participant reported compensating a similar role at a slightly higher an hourly wage (106%) and provided group benefits and full-time hours. The scope of the role was slightly different (i.e., no program management but a focus on arena facilities management and other ad-hoc duties related to parks, ballparks, etc.). This role required a recreation planning certification or equivalent education. Moreover, the role has 110-125% more responsibility compared to Shuniah's role description.

Group Benefits and Additional Compensation

MNP

Key Findings and Observations

- There is a high degree of variance in benefits offering across municipalities. This is due, in large part, to the fact employees received increases in their benefits packages based on tenure. Benefits for the positions of Economic Development Officer, Recreation Coordinator, and Fire Chief roles were omitted due to insufficient data and incomplete responses.

Group Benefits & Additional Compensation	Survey Results				Shuniah
	Minimum	Maximum	Median (P50)	Average	
Annual Allowed Sick Days	8	18	18	15.5	18
Annual Allowed Personal Days	0	3	0	1	2-3
Annual Allowed Vacation Days	15	40	20	21	15-20
Total Cost of Benefits (%)	20	26	22	23	N/A
Benefits Cost Sharing Structure (Employer/Employee %)	100	100	100	100	100
Life Insurance (Maximum $)	0	125,000	100,000	75,000	75,000
Short-term Disability (As % of base salary)	0	100	67	55	0
Long-term Disability (As % of base salary)	28	70	67	55	67
Paramedical Services	300	500	350	383	500
Vision Care	150	400	250	263	200
Prescription Drugs Coverage (After deductible)	100	100	100	100	100
Dental – Basic Services Coverage	100	100	100	100	100
Dental – Major Services Coverage	0	50 ($2k max)	0	17	0

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Initial Compensation Considerations for Discussion

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Initial Compensation Considerations for Discussion

The aim of this review was to provide Shuniah with an understanding of its level of comparability relative to peers in the market. Overall, Shuniah remains competitive and comparable to similar organizations, however, there are some highlighted areas that stood out in this analysis.

FUNCTIONAL AREA		COMPENSATION HIGHLIGHTS	
1	CAO Office	1	The span of control of Shuniah's CAO role was affirmed to be typical for a municipality (7:1).
2	Economic Development	2	The majority (4/5) responded that economic development activities are either located at the regional level and/or shared with other nearby municipalities.
3	Operations	3	The majority (4/5) reported that their Operations Manager (or comparable role) had significantly more responsibility (110-125%).
4	Planning / Clerk	4	Clerk responsibilities were typically not placed in this functional area.
5	Recreation Co-ordinator	5	One participant reported compensating a similar role at a slightly higher an hourly wage (106%) and provided group benefits and full-time hours.
6	Fire Services	6	All Respondents indicated that their Fire Chief did not carry the responsibility of by-law enforcement.
7	Treasury	7	Shuniah's base salary for the Treasurer / Deputy Clerk falls on the lower end of comparators actual compensation.

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