

## Service Squamish Initiative



## Corporate Services



## Core Service Review





# **Service Squamish Initiative Corporate Core Service Review Final Report**

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Corporate Services includes Administrative Services, Real Estate Services, Information Technology, Bylaw Enforcement and Animal Control, Communications, and Executive Administration. A Core Service Review of the Corporate Services Department was conducted as a continuation of the District's review of its services under the Service Squamish Initiative. This was the seventh review completed by the District over the past 24 months. Information Technology and Communications were not included in this review, as Core Service Reviews for these service areas were undertaken in 2010 and 2011 respectively.

The Review Team consisted of five senior staff including the General Manager of Corporate Services. All employees, except the General Manager, were interviewed as part of the review. No formal interviews with employees outside of the Department took place; however the Team considered all relative comments and issues raised by employees, as well as comments and issues identified during Core Service Reviews of other service areas. The Team also reviewed the breadth and depth of duties performed by the various service areas and assignment of those duties amongst staff. The Team identified challenges, opportunities and issues arising from the interviews, comments and review of duties and provided recommendations to better address and correct these issues.

The goals of the review included:

- Business process improvements;
- Customer service improvements; and
- Improved morale and empowerment of staff.

The Key Findings and Recommendations can be broken into three categories: Service Delivery to External Customers; Service Delivery to Council and Service Delivery to Internal Customers. In some instances, these are broken down further into the three main service areas covered within the review: Administrative Services, Real Estate Services and Bylaw Enforcement and Animal Control.

### **Service Delivery to External Customers**

The Corporate Services team has a strong sense of commitment to the District's External Customers. Responding quickly and accurately to public inquiries and complaints is a top priority for the Department. Corporate Services staff, in all three service areas, takes a great deal of pride in their efficiency and ability to provide this service and the amount of knowledge, history and municipal experience that the leaders on the Corporate Services team possess is cited as a key factor in the entire team's success in this area. The key measure tracked by the Department to evaluate success in this category is the turnaround times for responding to requests and complaints.

Staff cited some barriers to providing a higher level of customer service which included a lack of staffing resources on weekends, limitations in information sharing amongst departments and processes, facilities and systems, which may not provide optimal conditions. These issues are addressed within the recommendations.

### **Service Delivery to Council**

The Corporate Services Team is committed and highly diligent in all matters pertaining to Council business and in ensuring compliance with legislative requirements. The focus in this area is so pronounced that both the General Manager and Deputy Clerk are heavily involved with all Council matters, right down to ensuring agendas are correct, reports are submitted on time, minutes are accurate and action items are assigned. Although this focus is understandable and the function warrants a high degree of quality assurance, the workload and deadlines associated with this function are impeding Senior Staff's ability to undertake a more strategic approach to the management of the Department. Currently, a number of the administrative tasks are being performed by the Deputy Clerk. Some of these tasks should be delegated to other employees within the department to free up both the General Manager and Deputy Clerk to focus on broader Department and Corporate goals and to allow more time to coach and train staff within and outside the Department.

### **Service Delivery To Internal Customers**

While Corporate Services staff reported a strong sense of serving the community and ensuring the needs of external customers and Council are met, some staff and the Review Team, had a limited sense of how Corporate Services, particularly Administrative Services, supports the District internally. There seems to be a lack of vision for Administrative Services and limited focus on continual process improvement both for the Department and on a broader Corporate basis. A number of employees reported doing things because they "had always done them that way" and indicated that getting new ideas up and running was difficult.

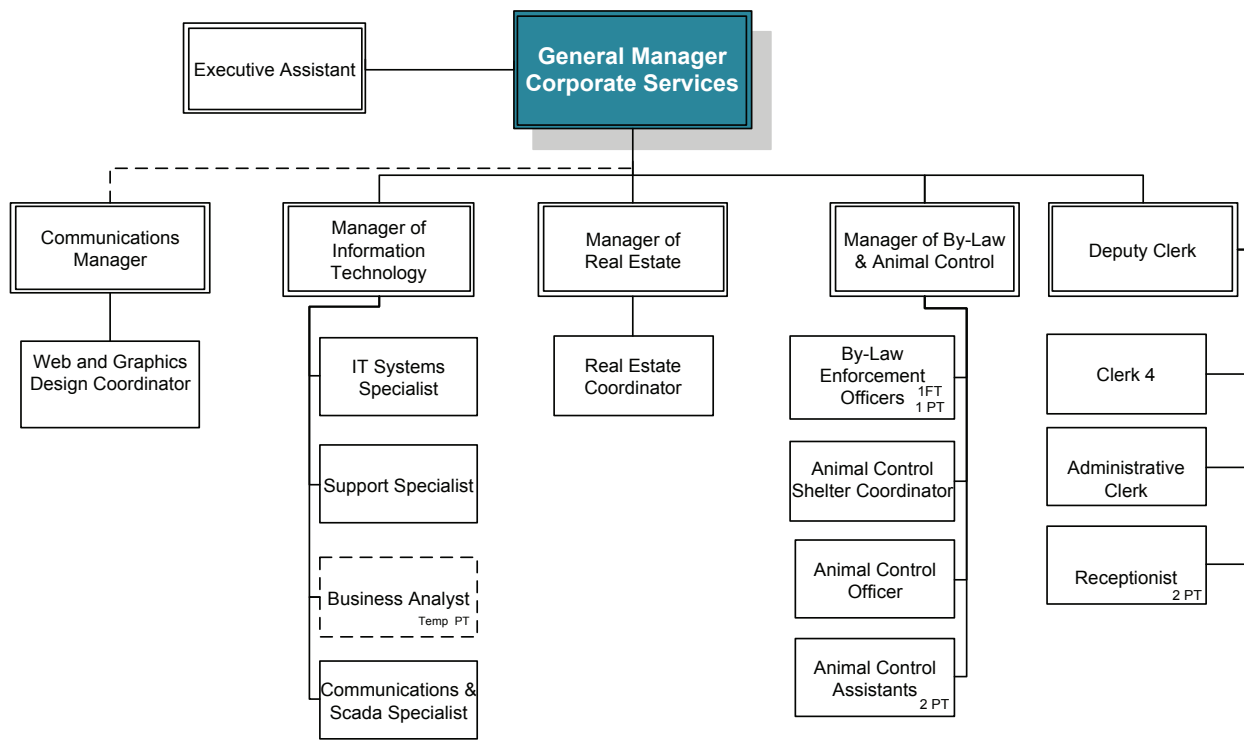
The Review Team heard comments from employees outside of the Department that they are unclear as to the support they can expect from Corporate (Administrative) Services. Although all Corporate Services staff demonstrates a willingness to help other departments when approached, support and direction to other departments does not appear to be a stated or well communicated mandate. Employees outside of Municipal Hall reported little understanding of how Council procedures work and what statutes, policies and procedures may govern staff activities.

The depth of expertise in the Administrative function provides an excellent resource to the broader Corporation that is not currently being tapped to its full potential. Corporate-wide standardization for customer service practices, administrative functions, records management and information release are just a few areas where the Corporate Services Department could provide a considerable level of leadership and training to the entire Corporation. It is recommended that Senior Staff place more emphasis on this area in general. Further, the Review Team supports additional staff resources, particularly in the area of corporate records management, to ensure that key corporate administrative practices can be more fully addressed on a continued basis.

In summary, Corporate Services is made up of knowledgeable, committed employees who know what needs to be done to ensure the Local Government runs effectively. With the development of a strong vision and a stronger connection to the overall goals of the Organization, Corporate Services is poised to be the successful administrative leader in the Organization.

The Core Service Review team examined the form and function of Corporate Services. The review consisted of a resource and capacity assessment of various departments (i.e. the form) as well as the services provided by each department (i.e. the function). In summary, Corporate Services is currently structured as follows:

## CURRENT ORGANIZATIONAL CHART



The Review Team reviewed an extensive list of tasks and duties performed by staff within the three service areas of the Corporate Services Department. The Team determined that, although some staff within Administration indicated they may have capacity or may require more challenging tasks, there was no shortage of required work. Some important areas of responsibility are not currently receiving the attention required and staff resources should be reallocated accordingly. A summary of the roles and responsibilities is provided below to demonstrate the breadth and depth of the Department's core service deliverables.

## **ADMINISTRATIVE SERVICES**

Corporate Officer roles and responsibilities and Corporate administrative services are broad and generally include the following:

- Perform all statutory responsibilities assigned to the Corporate Officer by legislation;
- Ensure proper Council and statutory meeting proceedings;
- Council meeting and agenda preparation;
- Maintain corporate records, develop bylaws, policies, procedures and provide staff training to meet legal requirements and best practice standards for records management;
- Conduct all municipal elections, voting, petition and electoral approval processes; Coordinate all aspects of committee appointments;
- Freedom of Information and Protection of Privacy Coordinator ;
- Corporate policy management;
- Public complaints management;
- Events coordination and Events Committee participation;
- Filming liaison, coordination, procedures and promotion;
- Research for Council, CAO, Department Heads, staff and public;
- Legal / Law Firm liaison;
- Executive Administration for CAO, Mayor and Council; and
- General administrative functions for the Corporation including reception, mail and courier, in-coming and out-going correspondence, office systems, supplies coordination and other general administrative functions.

## REAL ESTATE SERVICES

The Real Estate Division provides a wide variety of specialized services including but not limited to the following:

- Provides strategic support to the Mayor and CAO on major projects and special initiatives as necessary;
- Liaises with a number of external stakeholders on behalf of Mayor and CAO including Squamish Nation, Garibaldi at Squamish, Boundary Expansion, Community Forest;
- Liaison to a number of Community groups, Downtown BIA and various tenant groups;
- Provides information to BC Assessment Authority and other government agencies relating to real estate holdings within the Community;
- Conducts background research including land ownership, title searches, rights of ways, government regulations, field visits, meetings with other government representatives;
- Reviews financial pro-forma statements as required;
- Develops real estate-related policies and bylaws based on corporate need and municipal best practices, including conducting all aspects of research and consultation in support of bylaw and policy development, presentation to Council and liaison with key stakeholders following adoption;
- Coordinates all aspects of land acquisition and disposition for the Municipality from negotiations through to administration and ensures compliance with all statutory requirements specific to public sector land dealing;
- Acts as Airport Manager to oversee maintenance, capital improvements and servicing plans on behalf of tenants to facilitate airport operations; maintain lease agreements, develops relationships with current and potential tenants and liaises with external agencies as required.
- Provides a wide range of property management related duties for District-owned properties, including the management and administration of all lease agreements;
- Undertakes research and provides technical advice for other Departments as required particularly providing support to Economic Development, Building and Planning, Engineering and Parks, and Protective and Support Services
- Coordinates all aspects of real estate-related contracted services such as appraisers, real estate consultants and surveyors.

## **BYLAW ENFORCEMENT AND ANIMAL CONTROL**

The Bylaw Enforcement and Animal Control Department provides the following services to the District and Community:

- Administer and enforce regulatory bylaws such as, traffic, noise, unsightly premises, graffiti, business licences, signs, animal control, watering contrary to restrictions, boulevard maintenance, building, fire prevention, off-road vehicles, nuisances, site alteration, smoking, and wildlife attractants;
- Proactively patrol the Community for parking infractions and other bylaw violations and attend and patrol special events;
- Prioritize and respond to citizen complaints and inquiries; and investigate bylaw violations; Negotiate, mediate, and resolve conflicts within the community;
- Coordinate and perform bylaw enforcement investigations and inspections;
- Coordinate multi or inter-departmental responses to complex regulatory bylaw enforcement complaints or issues;
- Prosecute bylaw violations as required including administrative preparation and attendance at Court;
- Interpret, explain, advise with respect to Bylaws, statutes, regulations, policies and procedures to the public, staff, partners and stakeholders;
- Participate in Special Events Steering Committee; Safe Communities Squamish Leadership Table; Community Policing public education programs; Lower Mainland Animal Control Managers Committee; LIBOA – Licence Inspectors and Bylaw Officers' Association of BC Focus Group;
- Liaise with SPCA, RCMP, Bear Aware and Conservation Officers to coordinate strategic responses by enforcement officers;
- Liaise and partner with Squamish Nation Administration and Peace Keepers to strategize and respond to joint issues of concern;
- Maintain bylaw notice enforcement systems; ticketing and penalty recovery and other required records management and administrative processes;
- Research, recommend, and draft Bylaw and Animal Control policies, procedures, bylaw amendments, and bylaws;
- Maintain municipal pound ensuring best practices in facility maintenance and disease management; provide animal handling and care services; and
- Administer animal control programs such as volunteer Dog Walking training programs; dog adoptions; licensing and various animal control and welfare educational programs.

**STAFF INTERVIEW SUMMARY**

All staff in the three service areas under review, except the General Manager, were interviewed as part of this Core Service Review. The purpose and focus of the interview was to solicit input on improving efficiencies and service standards within the Department. Most interviews ran from 30 minutes to one hour. Staff were engaged and demonstrated a willingness to contribute to process improvements.

**INTERVIEW QUESTIONS****Introduction Questions:**

- What is the core responsibility of Corporate Services / or your respective service area?
- Who are your Customers?

**Core Questions:**

- What is working well in your department?
- What is not working / needs to be changed?

**Probing Questions:**

- What could the organization do to make your work life better?
- What function in your department is most wasteful?
- Which of the Service provided by Corporate Services, does the District not meet expectations of the community?
- Do you receive adequate direction and support to fulfill the expectations of your role?
- What other department do you work closest with? Is the relationship functional?

**Wrap up questions:**

- Name 3 things you would change if you were the Manager of the department?
- What other comments can you add

Interviews conducted with Administrative Services, Real Estate and Bylaw Enforcement and Animal Control employees resulted in the following high level themes and issues being identified.

**Employee Moral**

- Overall, staff indicated that the culture within the Department was respectful, cooperative and supportive.
- Most employees are generally happy with their role, and some indicated they were interested in additional duties and more challenging tasks.
- Some frustration exists surrounding the perceived inability to effect change and develop systems and processes that improve efficiencies.

**Role and Responsibilities**

- Responsibility for records management tasks are shared between a number of positions and the result being the function is not performed well nor are key records management activities coordinated amongst Departments. All service areas and a number of employees cited records management issues as a concern.
- Some employees in the Administrative Services area reported that they had excess capacity; they were not sufficiently challenged and are interested in further growth opportunities within their role. Conversely, other service areas and more senior staff indicated that several administrative, supervisory and more routine tasks suffered due to legislative duties and competing, and sometimes changing, priorities.
- Generally, there is a heavy emphasis on legislative activities at the expense of administrative activities. Each area identified weaknesses in finding the time and resources to address or oversee that administrative tasks and more routine duties, ranging from bylaw, policy and procedure maintenance and development, filing, non-profit lease administration, collections and ticket administration are being maintained at a minimum level.
- Staff suggested modifying the hours that the front counter is open to the public when walk-in and telephone traffic is generally low in order to provide an opportunity to address administrative duties currently not being performed.
- Real Estate Staff indicated general satisfaction, but experience difficulties adjusting to shifting priorities.
- Tenant relationships were cited as an area requiring improvement in the Real Estate area, and staff indicated that Council support is necessary when tenants bypass staff and go directly to Council.

**Customer Service**

- Overall, staff indicated a strong commitment and passion for customer service to the Community and Council, and several challenges were cited:
  - A shortage in staff resources was reported in Bylaw Enforcement and Animal Control resulting in no weekend and evening coverage, reduced service during peak times relative to the nature of services provided and delays in handling requests for service;
  - Reception desk services could be significantly enhanced if there was more cross-department communications and training for receptionists regarding staff contacts, roles and absences and frequently asked questions in other departments.
- Bylaw and Animal Control employees expressed a strong sense of passion and pride in their

function and accomplishments working with the Community and caring for animals and the animal shelter. Both Bylaw Enforcement and Animal Control staff indicated that they are unable to be sufficiently proactive in bylaw enforcement and provide the level of public education and customer service they would like to deliver due to current resource levels, facility limitations and restrictions with current ticketing and enforcement tools, and collection activities.

### **Leadership**

- Managers were reported as accessible and open to dialogue and sharing of information.
- Some employees reported a lack of vision and strategic direction for the Department and expressed a desire for more direction, coaching and mentoring.
- Staff indicated that the General Manager is very knowledgeable, but is often too busy to provide sufficient guidance, coaching and direction for the development of other managers and staff.
- A number of employees reported waiting in line for answers from the General Manager and there appeared to be a heavy reliance on past knowledge and practices which only the GM could provide.
- A reluctance to change the way “we” do things was reported and implementation of new ideas was reported to be slow or “stuck” at the Senior Staff levels.
- It appeared that other departments are not always aware of changes or updates in bylaws, policies and procedures that directly affect their activities, or about corporate standards for branding, letterhead, external communications and information release.
- Some employees identified a lack of clarity between the role of the General Manager (GM) and the Deputy Clerk.
- It was suggested that the Web and Graphics Technician should report directly to the Communications Manager.
- Bylaw Enforcement staff appreciated their connection to the RCMP. The connection enhances training, safety and sharing of important information and some staff indicated that this function could align with Protective and Support Services Division to ensure this close working relationship is maintained.

### **Resources**

- A need for improved tools to perform duties in a more effective and safe manner was expressed.
- Requests for improvements included:
  - Radios for Bylaw Enforcement Officers;
  - A paging system and enhanced phone systems for Reception;
  - A colour printer for Communications activities;
  - Animal Shelter facility improvements for Animal Control staff that allowed customers to view dogs in a safe environment and without dedicated one on one staff assistance;
  - Website and internet improvements to better facilitate external communications and live streaming of Council meetings; and
  - Generally the need to use technology more to improve various databases and booking systems; such as the complaints tracking system and self-serve meeting room bookings.

## OVERALL KEY RECOMMENDATIONS

### Leadership

- There is a unique opportunity for Administrative Services to demonstrate leadership in improving how the District does business by providing other departments with guidance, training and support with forms development, process and procedural improvements, branding, communications, statutes, bylaws and Council procedures.
- The development of strategic direction and redevelopment of policies and procedures would assist District Employees looking for administrative and legislative direction from Administrative Services Management and Staff.
- The General Manager needs to delegate duties to afford time to provide better support to Staff and Managers.
- The Deputy Clerk needs to take an enhanced role in providing leadership in managing staff, providing direction and making decisions.
- A Corporate Services Vision and Departmental Strategies for work programs related to that Vision and to Council's priorities needs to be developed.
- Include more cross-department communication by Corporate Services' Managers and facilitate coaching opportunities.

### Roles And Responsibilities

- Review Real Estate Services capacity in 2013 resulting from adoption of Delegation Bylaw and implementation of a Real Estate Strategic Plan.
- Review options for staffing schedules and resourcing capacity to facilitate weekend and evening hours for Animal Control and Bylaw Enforcement Officers.
- Investigate cross- training, classification and job duties of Animal Control Officers and Bylaw Enforcement Officers for opportunities to better facilitate bylaw enforcement in both areas.
- Raise the profile of the Deputy Clerk position beyond "corporate officer" duties to undertake a stronger leadership role in administrative and corporate office (legislative) matters and to allow the General Manager to let go of administrative tasks and take on a more strategic role departmentally and corporately.
- Clearly define, segregate and communicate the roles of Deputy Clerk and General Manager.
- Develop legislative duties for the Executive Assistant position to help alleviate Deputy Clerk workload.

### Organizational Structure Changes

- Maintain the relationship between Bylaw Enforcement and RCMP within the Emergency Services Building.
- Reinstate the Communications function under Corporate Services.
- Create Records Management Coordinator position.
- Eliminate Administrative Clerk position in Administrative Services.
- Reclassify Receptionists to Corporate Customer Service Clerks.

### **Recommendations Already Underway**

- Radios for Bylaw Enforcement and Animal Control included in 2012 capital budget.
- Weekend Animal Control Officer coverage re-introduced in 2011 and 2012 budget. Staff recruitment being undertaken.
- Information Technology (IT) investigating leasing options or relocation for colour copier in the Print/Mail Room. Trial of machines underway.
- IT arranging training for employees unfamiliar with telephone system.
- IT planning for improvements to telephone system to correct paging and intercom system at Switchboard (identified in Building and Planning Core Service Review).
- All Administrative Services staff are reporting to Deputy Clerk.
- Deputy Clerk is taking the lead on Agenda preparation.
- Complaint system security has been improved.
- Real Estate Principles adopted.
- Delegation Bylaw related to Real Estate (leases/licences) adopted

## DEPARTMENT SPECIFIC KEY RECOMMENDATIONS

### Administrative Services Recommendations

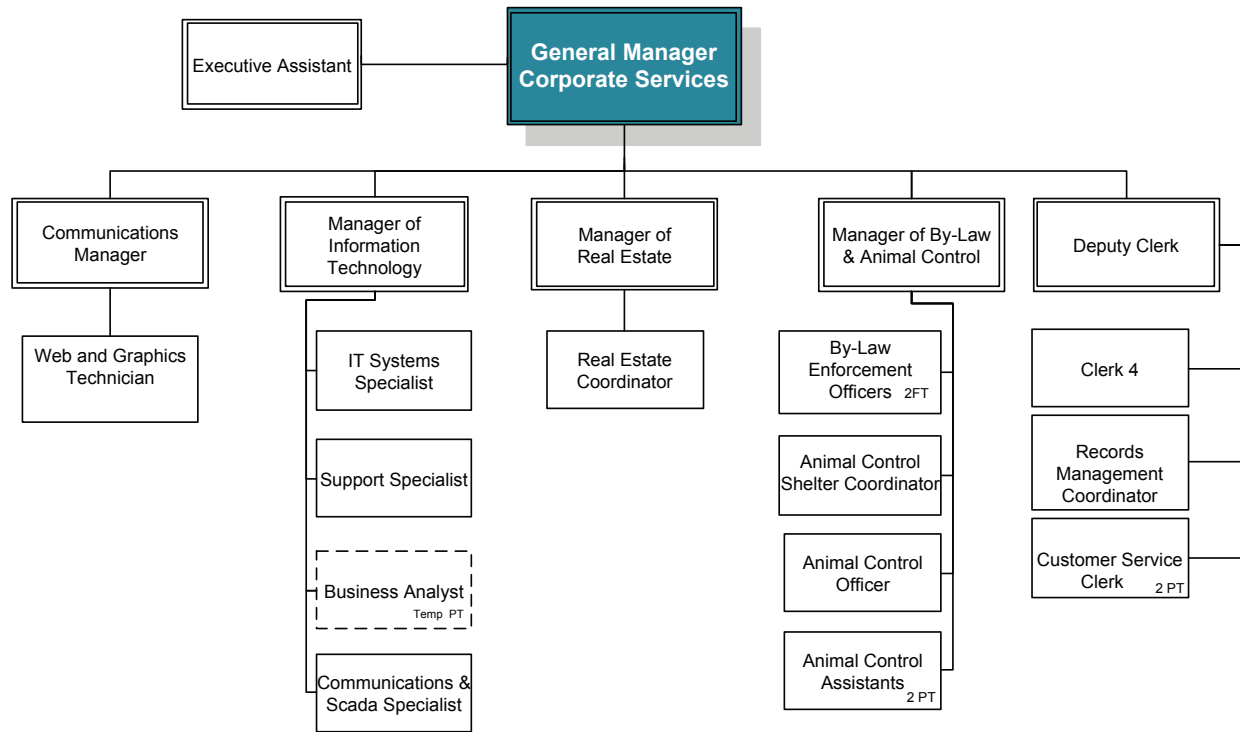
- Increase leadership role of Deputy Clerk in managing Administrative Services area. Information Technology (IT) to fix the phone system – fix paging system, or install intercom on telephones.
- IT to review color copier usage at Municipal Hall and propose solution for a colour copier in the Copier/Mail room.
- Complaint system security to be improved.
- Complete roll out the Communications Strategy and Plan.
- Reclassify Receptionists to Customer Service Clerk to facilitate increased external and internal customer service.
- Eliminate Administrative Clerk position and create a Records Management Coordinator position.
- Research for FOI to be included within records management function.
- Executive Assistant to take on more responsibility related to legislative services assistance, and strategic policy development and maintenance.
- Implement Communication Plan recommendations related to Executive Assistant role.
- Recommend a capacity review of Executive Assistant role three months after new CAO hire.
- Develop meeting room booking procedure, that gives Managers more access, and ensure all District staff follow process.

### Bylaw & Animal Control Recommendations

- Radios have been included in the 2012 Capital Budget to address employee safety and increase communication capability.
- Develop records management system for Animal Control and Bylaw Enforcement utilizing LGMA Records Management Program utilized by the District.
- Create follow up procedures with the Finance Department related to collection of tickets issued.
- Create facility replacement plan for the Animal Control Shelter based on recommendations from the District Facilities Review in 2010.
- Fill vacant weekend Animal Control Officer hours.
- Address Bylaw Enforcement hours for weekend and summer evenings coverage.

### Real Estate Recommendations

- Prepare a Council Delegation Bylaw for simple licenses and lease renewals. This would streamline the decision-making process.
- Prepare a 5-year Real Estate Strategy.
- Establish process for registrations of legal instruments such as rights-of-way, covenants, easements.
- Establish filing system with Records Management Coordinator including a database and bring forward or journalized system for scheduling of recurring items.



## ACTION PLAN / PRIORITY

The key recommendations coming from review drive the following goals for Corporate Services:

### Goal – Exceptional Leadership and Empowered Employees

Promote innovation and constant improvement, empowering staff to excel and be leaders in the organization.

### Goal - Organizational Effectiveness

Ensure that systems and processes promote effectiveness and create efficiencies to best utilize limited resources.

### Goal –Customer Service And Organizational Support

Increase support and direction provided to other departments within the Municipality.

### Goal – Appropriate And Effective Tools And Resources

Ensure employees have the tools and resources to do their jobs effectively and efficiently.

The following table outlines the tasks, priorities and timelines that drive these goals and that will ensure the recommendations of this review are implemented. The timeline and priority levels are estimate and are subject to change once a more in-depth assessment of each recommendation is done and are based on the review input.

Goal	Recommendation	Priority	Timeline
Exceptional Leadership	Increase leadership on the part of the General Manager and Managers by clearly defining roles and responsibility.	High	Q3 2012 – Q4 2012
Exceptional Leadership	Increase GM leadership role to become more strategic and less involved in day to day operations of the Department.	High	Q3 2012 – Q4 2012
Exceptional Leadership	Create a vision for Corporate Services.	High	Q4 2012 – Q1 2013
Exceptional Leadership	Enable and engage Employees to drive the vision for the department.	Med	Q1 2013 – Q3 2013
Exceptional Leadership	Empower employees through process brainstorming and improvement sessions followed by implementation sessions	Med	Q1 2013 – Q3 2013
Exceptional Leadership	Explore including Legislative Duties in the Executive Assistant Role to alleviate work volume issues at the GM and Deputy Clerk level	High	Q3 2012 – Q4 2012
Exceptional Leadership	Investigate cross training Animal Control and Bylaw Enforcement Officers	Med	Q1 2013 – Q3 2013
Organizational Effectiveness	Create a new Records Management position.	High	Q3 2012 – Q4 2012
Organizational Effectiveness	Provide Animal Control Officer and Bylaw Enforcement presence on weekends.	High	Q3 2012 – Q4 2012
Organizational Effectiveness	Adopt a Delegation Bylaw for Real Estate	Med	Complete
Organizational Effectiveness	Complete a Real Estate Strategic Plan.	High	Q3 2012– Q2 2013

Organizational Effectiveness	Develop meeting room booking procedure that give Managers more control and communicate / monitor process	High	Q3 2012 – Q4 2012
Organizational Effectiveness	Create a corporate – wide Customer Service focus at front desk	High	Q3 2012 – Q4 2012
Customer Service & Org. Support	Elevate Administrative Services support for internal customer service.	Med	Q1 2013 – Q3 2013
Customer Service & Org. Support	Develop Administrative Services, Real Estate Services and Bylaw Enforcement standards and support that is clear to the entire organization.	High	Q1 2013 – Q3 2013
Customer Service & Org. Support	Reclassify Receptionist to Customer Service Clerk to add more clerical and capacity for administrative support.	High	Q3 2012
Customer Service & Org. Support	Complete the implementation of the Communication Plan.	High	Ongoing in progress
Customer Service & Org. Support	Create and share Communication guidelines.	High	Q1 2013 – Q3 2013
Customer Service & Org. Support	Define and share internal support available to other departments for all of Corporate Services on Freedom of Information and Privacy Protection Act (FOIPPA) regulations, Bylaw Enforcement role and support, records management best practices, policy development and roll out, customer service support, Real Estate Services support.	Med	Q1 2013 – Q3 2013
Effective Tools & Resources	Install a colour photocopier in the Administration offices.	High	Complete
Effective Tools & Resources	Resolve radio communications safety issues for Bylaw and Animal Control.	High	Complete
Effective Tools & Resources	Address and streamline administrative needs for Bylaw Enforcement to allow more time for actual enforcement duties.	High	Q1 2013 – Q3 2013
Effective Tools & Resources	Establish “best practice” procedures with Finance Department for collections of tickets and fines.	High	Q1 2013 – Q3 2013
Effective Tools & Resources	Address the need for a paging system and enhanced phone systems for Reception	Med	Q4 2012 – Q1 2013
Effective Tools & Resources	Research and request funding for Animal Shelter facility improvements for Animal Control staff that allowed customers to view dogs in a safe environment and without dedicated one on one staff assistance;	Med	Q1 2013 – Q3 2013
Effective Tools & Resources	Increase the effectiveness of the Website to facilitate better internal and external communication.	High	In Progress Q4 2012



