Municipality of West Elgin

Achieving Organizational Excellence

Final Report

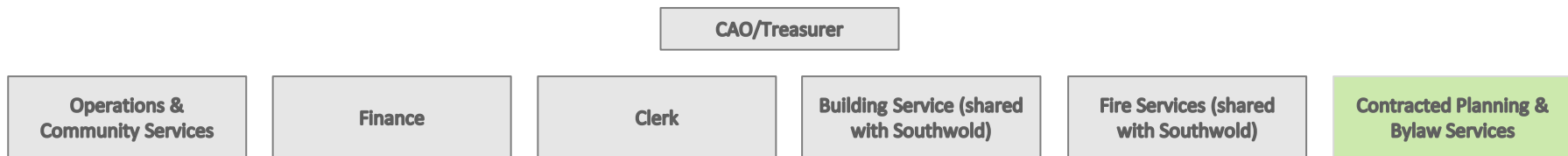December 11, 2023

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1.0 Introduction

Project Context

❑ With a population of approximately 5,000 residents and 322 square kilometers, West Elgin is a rural municipality within Elgin County. Rodney and West Lorne are the two main population centres with several smaller communities. The Municipality is governed by a Mayor, Deputy Mayor, and three Councillors.

❑ Providing a range of services, the Municipality of West Elgin is organized into the following departments/business units.

CAO/Treasurer					
Operations & Community Services	Finance	Clerk	Building Service (shared with Southwold)	Fire Services (shared with Southwold)	Contracted Planning & Bylaw Services

❑ This project includes four phases:

THIS PHASE

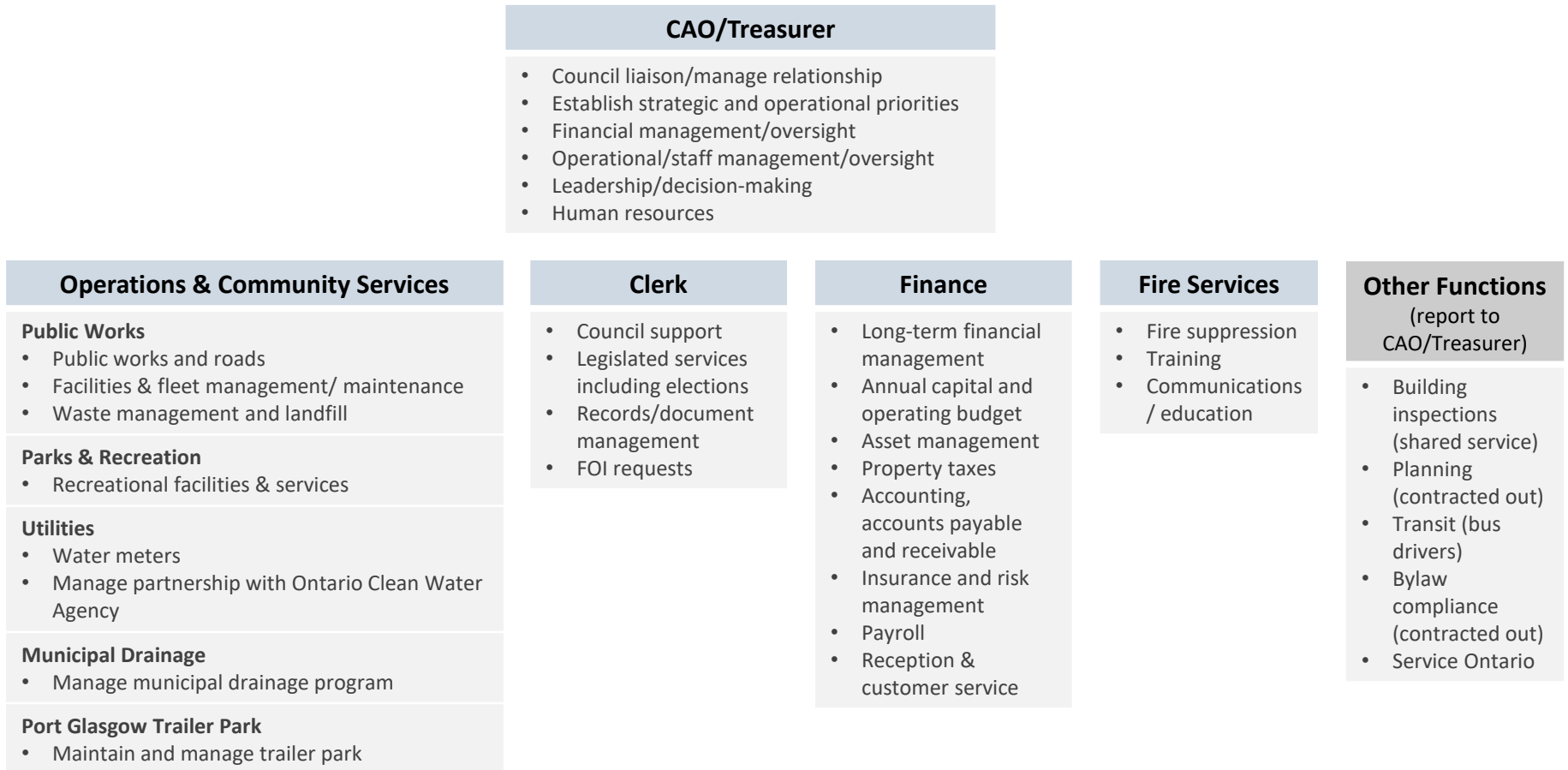| 1. Project Launch & Background Review	2. Current Assessment & Case for Change	3. Design & Options	4. Recommendations & Final Report	5. Implementation (out of scope)
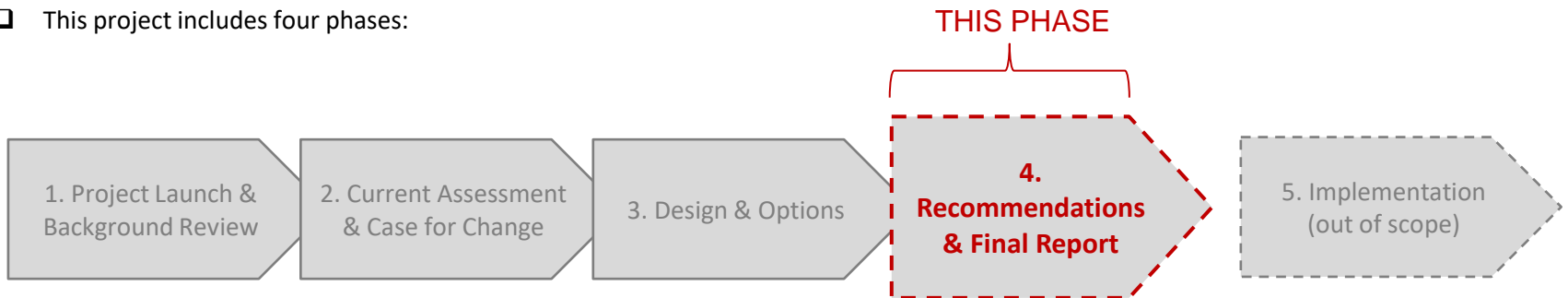
The Purpose of This Document

❑ The purpose of this document is to pull together all project findings and present detailed recommendations; propose staffing realignment; and sequence the implementation of recommendations.

Starting Point

❑   The below Current State Functional Model includes the primary functions by department/business unit.

CAO/Treasurer

- Council liaison/manage relationship
- Establish strategic and operational priorities
- Financial management/oversight
- Operational/staff management/oversight
- Leadership/decision-making
- Human resources

Operations & Community Services

Public Works
- Public works and roads
- Facilities & fleet management/ maintenance
- Waste management and landfill

Parks & Recreation
- Recreational facilities & services

Utilities
- Water meters
- Manage partnership with Ontario Clean Water Agency

Municipal Drainage
- Manage municipal drainage program

Port Glasgow Trailer Park
- Maintain and manage trailer park

Clerk

- Council support
- Legislated services including elections
- Records/document management
- FOI requests

Finance

- Long-term financial management
- Annual capital and operating budget
- Asset management
- Property taxes
- Accounting, accounts payable and receivable
- Insurance and risk management
- Payroll
- Reception & customer service

Fire Services

- Fire suppression
- Training
- Communications / education

Other Functions
(report to CAO/Treasurer)

- Building inspections (shared service)
- Planning (contracted out)
- Transit (bus drivers)
- Bylaw compliance (contracted out)
- Service Ontario

Summary of Current State Assessment Findings

❑ A highly collaborative approach was used to complete this phase of work, including:

— Review of existing documents, including current organizational charts, job descriptions, and other relevant reports;

— Project launch meeting with the CAO/Treasurer and senior management team;

— One-on-one interviews with Members of Council, CAO/Treasurer and senior management team;

— Staff group sessions (3 sessions/21 staff participated);

— Staff questionnaire (9 responses);

— Staff "office hours" for 1-on-1 conversations with staff (23 interviews) ; and

— Ongoing discussions with the CAO/Treasurer and senior management team.

❑ The Current Assessment: Case for Change (see Appendix for full report) documenting synthesized finding into the following themes:

1. **Leadership & Decision-Making** – While there is widespread agreement among Members of Council and staff that the relationship between Council and the administration is very respectful and positive, the current workload on the CAO/Treasurer is unsustainable and does not contribute to effectively managing the organization.

2. **Customer Service & External Communication –** While there have been some improvements, there is agreement that external communications needs to improve. Currently, there is a lack of internal capacity for this function.

3. **Teamwork & Collaboration –** There is a perception that staff can work well together when there is a sense of urgency or a deadline, but there is some frustration regarding the lack of consistent internal communication and collaboration.

4. **Roles, Responsibilities & Workload –** Widespread agreement among management, staff and Councillors that the workload on the CAO/Treasurer and the Manager, Operations & Community Services is too heavy. They are unable to dedicate sufficient time/effort for either strategic leadership or mentoring their staff.

5. **Succession Planning & Staff Morale –** High staff turnover was identified by Councillors, managers and staff as the most critical issue facing the municipality. While rate of pay was identified as a major cause, poor staff morale and interpersonal conflicts also contribute to this situation.
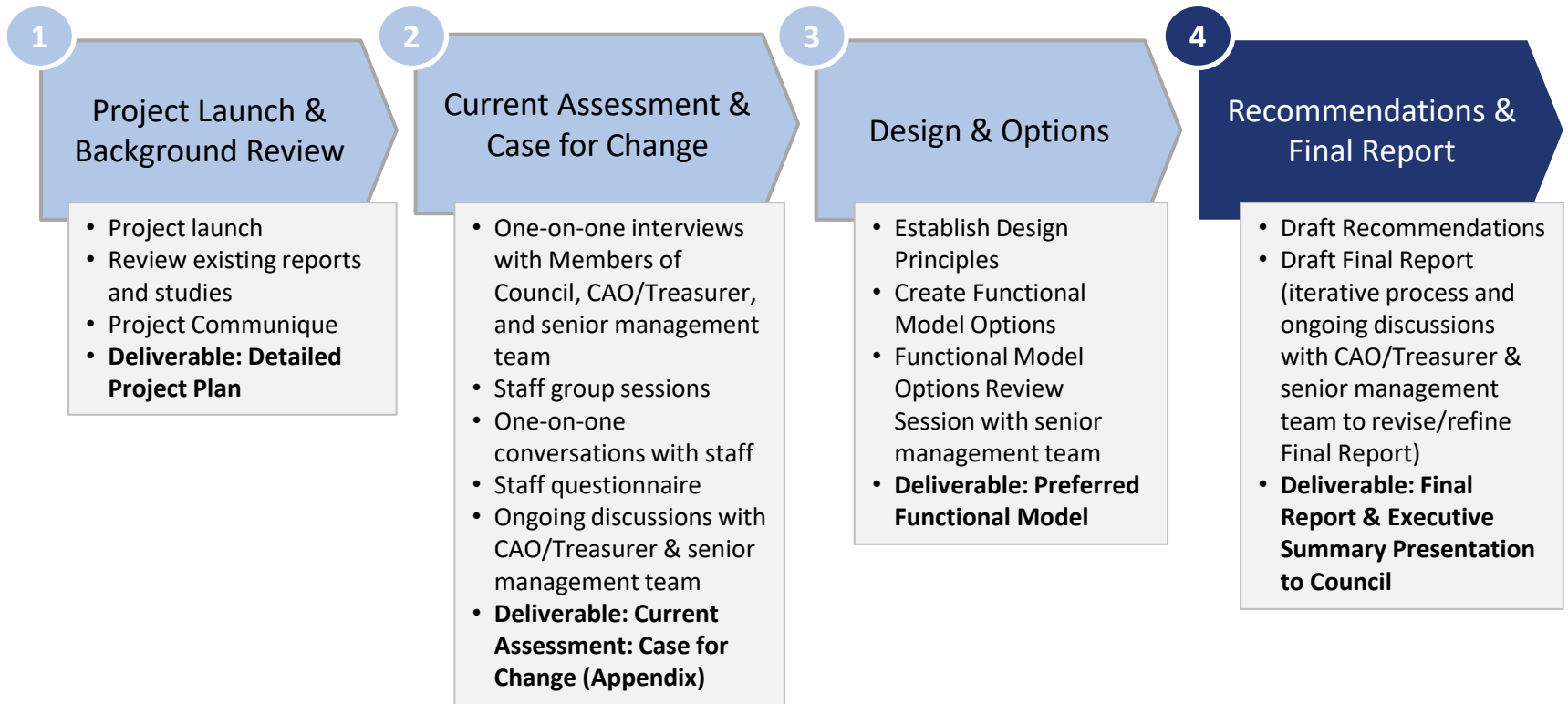
❑ In addition to addressing the current operational challenges, it is important that any changes are based on principles of good organizational design in order to ensure long-term organizational effectiveness. The below Design Principles have been used to create the Preferred Functional Model:

1. **Contribute to Achieving Strategic Priorities.** Organizational change must provide a solid foundation to ensure the municipality is positioned to deliver results based on strategic priorities.

2. **Compliance to Legal Requirements.** Organizational change must ensure the municipality has the capacity to comply with statutory requirements.

3. **Cluster Functions Based on their Strongest Synergies.** Organizational change needs to cluster functions based on the strongest synergies and dependencies.

4. **Ensure Balanced Span of Authority.** Organizational change needs to be consistent with the best practice of balanced spans of authority across the organization, both from a perspective of number of staff and number of functional areas.

5. **Contribute to Citizen-Focused Service Delivery.** Organizational change should enhance the capacity of the municipality to provide services in an accessible, responsive and timely manner.

6. **Demonstrate That People Are Valued.** Organizational change should contribute to improvements to employee engagement and provide opportunities for career progression.

7. **Realistic & Affordable.** Organizational change needs to be achievable. Conceptual models may look good on paper, but if implementation success is improbable, the changes should not be attempted.

2.0 Recommendations

From Findings to Recommendations

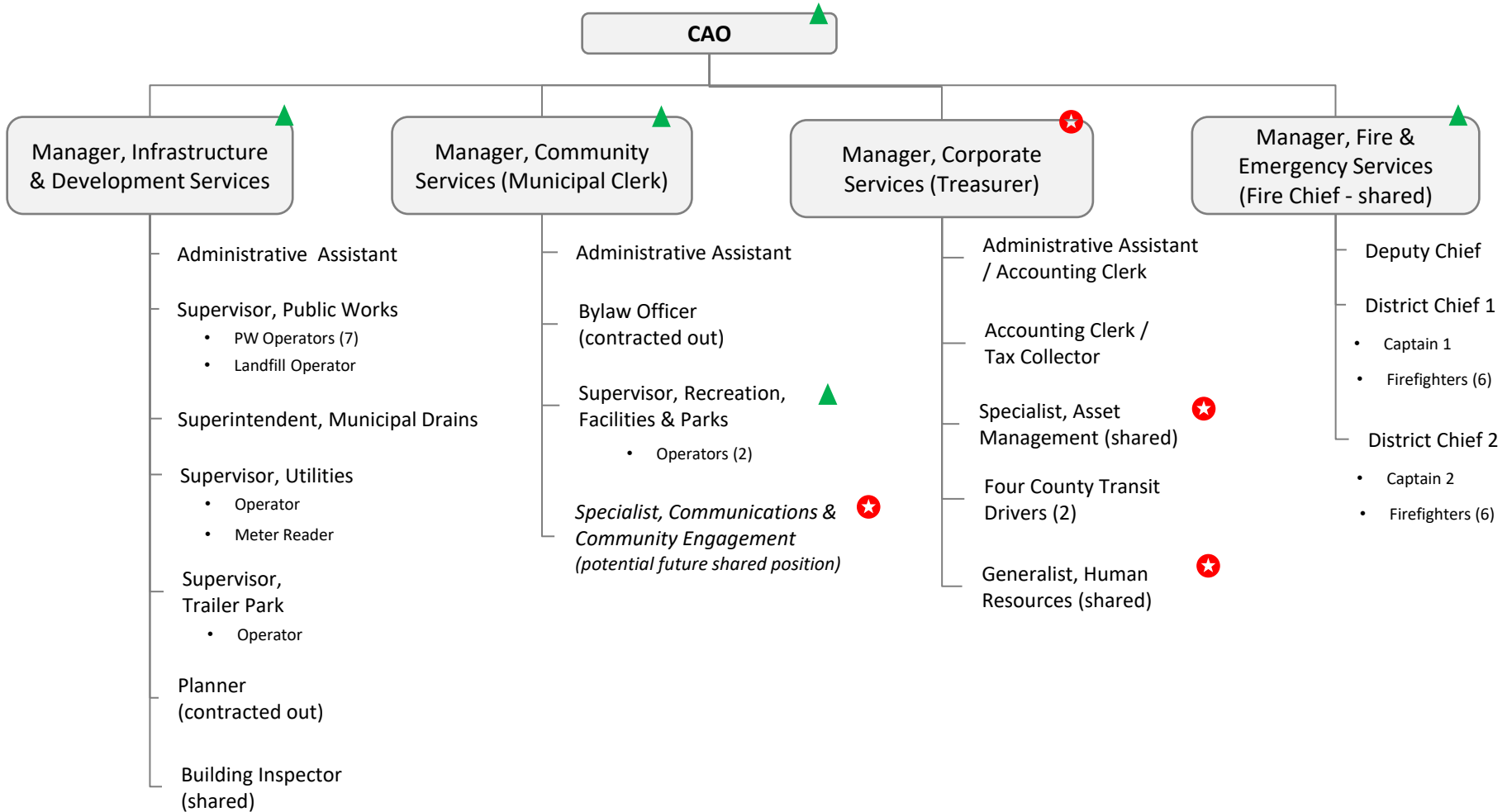❑   The below process was used to transition from findings to recommendations:

1

Project Launch & Background Review

- Project launch
- Review existing reports and studies
- Project Communique
- **Deliverable: Detailed Project Plan**

2

Current Assessment & Case for Change

- One-on-one interviews with Members of Council, CAO/Treasurer, and senior management team
- Staff group sessions
- One-on-one conversations with staff
- Staff questionnaire
- Ongoing discussions with CAO/Treasurer & senior management team
- **Deliverable: Current Assessment: Case for Change (Appendix)**

3

Design & Options

- Establish Design Principles
- Create Functional Model Options
- Functional Model Options Review Session with senior management team
- **Deliverable: Preferred Functional Model**

4

Recommendations & Final Report

- Draft Recommendations
- Draft Final Report (iterative process and ongoing discussions with CAO/Treasurer & senior management team to revise/refine Final Report)
- **Deliverable: Final Report & Executive Summary Presentation to Council**

CAO

- Economic development & business relations

Infrastructure & Development Services	Community Services	Corporate Services	Fire & Emergency Services
Public Works • Infrastructure & roads • Fleet & equipment • Waste management & landfill **Municipal Drainage** **Utilities** • Water management **Trailer Park** • Operations & maintenance **Development Services** • Planning services (contracted out) • Building inspections (shared)	**Clerk Services** • Legislated services & Council support • Office management • Internal communication • Records management • FOI requests • Customer service / reception • Bylaw enforcement (contracted out) **Communications** • Corporate communications, marketing & promotion • Community engagement **Recreation, Facilities & Parks** • Recreational facilities, parks, open spaces, trails & programs • Scheduling & booking • User group liaison	**Finance** • Long-term finances • Budgeting • Asset management • Property taxes • Accounting, accounts payable & receivable • Insurance/risk management • Payroll **Technology & Systems** • IT support • Systems integration/ implementation **Human Resources** (shared with County) **Transit** (shared/contracted out)	**Fire & Emergency Services** • Fire suppression • Training • Education & awareness **Emergency Planning** • Manage Township emergency planning as CEMC

Model Basic Features / Changes from Status Quo

- Four departments / five senior management team members
- Four direct reports to CAO
- All functions (except for ED & business relations) under a "home" department
- Shifted recreation, facilities & parks out of current Public Works Department
- Shifted planning and building to Infrastructure & Development Services

- Shifted bylaw enforcement to Community Services under the Clerk
- Developed a Corporate Services Department with finance, IT, human resources and transit administration
- Added emergency planning (CEMC) to Fire & Emergency Services

CAO ▲

Manager, Infrastructure & Development Services ▲

Manager, Community Services (Municipal Clerk) ▲

Manager, Corporate Services (Treasurer) ⭐

Manager, Fire & Emergency Services (Fire Chief - shared) ▲

Manager, Infrastructure & Development Services
- Administrative Assistant
- Supervisor, Public Works
  - PW Operators (7)
  - Landfill Operator
- Superintendent, Municipal Drains
- Supervisor, Utilities
  - Operator
  - Meter Reader
- Supervisor, Trailer Park
  - Operator
- Planner (contracted out)
- Building Inspector (shared)

Manager, Community Services (Municipal Clerk)
- Administrative Assistant
- Bylaw Officer (contracted out)
- Supervisor, Recreation, Facilities & Parks ▲
  - Operators (2)
- *Specialist, Communications & Community Engagement (potential future shared position)* ⭐

Manager, Corporate Services (Treasurer)
- Administrative Assistant / Accounting Clerk
- Accounting Clerk / Tax Collector
- Specialist, Asset Management (shared) ⭐
- Four County Transit Drivers (2)
- Generalist, Human Resources (shared) ⭐

Manager, Fire & Emergency Services (Fire Chief - shared)
- Deputy Chief
- District Chief 1
  - Captain 1
  - Firefighters (6)
- District Chief 2
  - Captain 2
  - Firefighters (6)

⭐ Proposed new position

▲ Proposed revision to position

Recommendations Summary

Recommendation 1 - Formalize three levels of leadership with clear position roles, responsibilities, and expectations at each level.

Recommendation 2 - Establish a four-department structure with manager-level department heads reporting to the CAO. These departments are Infrastructure & Development Services, Community Services, Corporate Services, and Fire & Emergency Services.

Recommendation 3 - Create a Manager, Corporate Services (Treasurer) position reporting to the CAO with responsibility to oversee and manage the Township's finances, technology systems and services, human resources, customer services, and transit administration. This position will be part of the senior management team.

Recommendation 4 - Revise the job description of the current Manager of Operations and Community Services to become the Manager, Infrastructure & Development Services. This position will continue to report to the CAO with responsibility to manage and maintain the Township's transportation network, utilities, drainage, and landfill assets while overseeing all planning and building inspection activities. This position will continue to be part of the senior management team.

Recommendation 5 – Revise the job description of the current Municipal Clerk position to become the Manager, Community Services (Municipal Clerk). This position will continue to report to the CAO with responsibility to manage legislative/clerk services, Council support, information/records management, bylaw compliance, communications/community engagement and recreation, facilities and parks; review workload after six months to determine if a shared Specialist, Communications & Community Engagement position is required. This position will continue to be part of the senior management team.

Recommendation 6 - Create a shared Specialist, Asset Management position reporting to the Manager, Corporate Services (Treasurer) with responsibility to implement the Township's asset management strategy in compliance to statutory requirements.

Recommendation 7 - Work with Elgin County to add a shared Generalist, Human Resources position with the responsibility to create and implement progressive HR processes, policies, and practices to contribute to the Township being an "employer of choice". This position will report to the Manager, Corporate Services (Treasurer).

Recommendation 8 - Add emergency planning function to the Fire Services Department and formalize the Fire Chief as the Community Emergency Management Coordinator (CEMC); rename this department "Fire & Emergency Services" under the Manager, Fire & Emergency Services (Fire Chief). This position will continue to report to the CAO.

Recommendation 9 - Initiate quarterly CAO/senior management team-led town hall sessions with all staff to build positive morale and ensure that all staff hear consistent messages from their leaders.

Recommendation 10 - Provide mandatory "people management" training to all managers and supervisors.

Recommendation 1

Formalize three levels of leadership with clear position roles, responsibilities, and expectations at each level.

Actions Items

- Formalize the below three-level leadership model:

Position	Roles
Chief Administrative Officer	• Organizational oversight • Establish organization-wide goals and priorities • Leads Senior Management Team • Primary Council point of contact
Manager	• Department oversight • Accountable for departmental goals and priorities • Member of Senior Management Team • Eligible to be Acting CAO if required • Council attendance/interaction
Supervisor	• Day-to-day supervision of activities and staff

Rationale / Anticipated Benefits

- Currently, the CAO and managers are very involved in day-to-day operations. The CAO and managers need to have more capacity to spend time and effort on leadership, decision-making and mentoring their staff
- Establishes the expectation that the CAO and managers primarily interact with Members of Council.
- Aligned to the following Design Principles:
  - **DP1 – Contribute achieving strategic priorities** by formalizing accountability for organizational goals at the CAO and Manger level.
  - **DP6 – Demonstrate that people are valued** by clarifying basic expectations at every leadership level.
  - **DP7 – Realistic & affordable** as this is a low-cost recommendation

Implementation Considerations

- Alignment with Recommendation 10 to ensure that all three levels of leadership receive "people management" training to contribute to effective leadership, coaching and mentoring across the organization.

Timing: Phase 1 Implementation

Recommendation 2

Establish a four-department structure with manager-level department heads reporting to the CAO. These departments are Infrastructure & Development Services, Community Services, Corporate Services, and Fire & Emergency Services.

Actions Items

- Establish the following mandate statements for each department:
  - **Infrastructure & Development Services** – maintain and manage the Township's transportation and water assets while providing oversight for future growth and development.
  - **Community Services** – support Council/meetings, manage the office, manage documents/records, and share information internally and externally, oversee bylaw compliance efforts, and manage recreation facilities, parks and programs.
  - **Corporate Services** – manage the long-term and day-to-day finances of the municipality and plan and support cross-departmental IT, human resources, and asset management functions.
  - **Fire & Emergency Services** – oversee all fire suppression and education functions and provide oversight of the Township's emergency management program.

Rationale / Anticipated Benefits

- This four-department structure provides departmental "homes" for all Township functions ensuring accountability for outcomes.
- Reduces standalone activities/staff that currently fall under the responsibility of the CAO.
- Aligned to the following Design Principles:
  - **DP1 – Contribute achieving strategic priorities** by formalizing shared accountability for organizational goals and priorities among a larger senior management team.
  - **DP2 – Compliance to Legal Requirements** by formalizing accountability for mandatory services (e.g. emergency management, bylaw compliance, and human resources).
  - **DP3 – Cluster functions based on strongest synergy** by merging functions that are operationally dependent.
  - **DP4 – Ensure balanced span of authority** by establishing four balanced departments in terns of functions and staffing.
  - **DP5 – Contribute to citizen-focused service delivery** by formalizing communication in Community Services and customer services in Corporate Services.
  - **DP6 – Demonstrate that people are valued** by providing more opportunities for career progression.

Implementation Considerations

- Adding staff complement will have to be phased over the next several years.

Timing: Phase 1 Implementation

Recommendation 3

Create a Manager, Corporate Services (Treasurer) position reporting to the CAO with responsibility to oversee and manage the Township's finances, technology systems and services, human resources, customer service, and transit administration. This position will be part of the senior management team.

Actions Items

- Council approval of this new position.
- Develop a detailed job description based on the position description included in this report.
- Advertise and hire this position.
- Transition responsibilities from the CAO to this position over a 6-month period.

Rationale / Anticipated Benefits

- Addresses urgent issue of having one position to perform both CAO and Treasurer roles. This was identified as the top issue by both Members of Council and staff at all levels.
- Aligned to the following Design Principles:
  - **DP1 - Contribute to achieving strategic priorities** by establishing a standalone Manager, Corporate Services, to share the workload with other members of the senior management team.
  - **DP3 – Cluster functions based on strongest synergies** by ensuring accountability for similar and dependent corporate-focused services under one manager.
  - **DP4 – Ensure balanced span of authority** by adding an additional member to the senior management team to better balance leadership responsibilities and expectations.
  - **DP6 – Demonstrate that people are valued** by addressing a current urgent CAO workload issue. This demonstrates to the entire organization that people work-life balance matters.

Implementation Considerations

- This is an implementation priority. The Township risks losing good people if this recommendation is not acted upon in a timely manner.

Timing: Phase 1 Implementation

Recommendation 4

Revise the job description of the current Manager of Operations and Community Services to become the Manager, Infrastructure & Development Services. This position will continue to report to the CAO with responsibility to manage and maintain the Township's transportation network, utilities, drainage, and landfill assets while overseeing all planning and building inspection activities. This position will continue to be part of the senior management team.

Actions Items

- Revise job description based on the position description included in this report.
- Shift recreation, facilities and parks functions and staff to the Community Services Department over a 2-month period.
- Take over managing contracted out planning services over a 2-month period.
- Take over managing building inspections and the associated shared services agreement over a 2-month period.

Rationale / Anticipated Benefits

- Contributes to addressing the issue that the current workload of the Manager of Operations and Community Services is too heavy and span of authority too broad.
- Aligned to the following Design Principles:
    - **DP1 - Contribute to achieving strategic priorities** by taking over the management of planning and building activities to free up time for the CAO to manage the organization and communicate with Council.
    - **DP2 – Compliance to legal requirements** by ensuring a manager-level position is accountable to achieving all statutory planning and building review/approval timelines.
    - **DP3 – Cluster functions based on strongest synergies** by ensuring accountability for similar and dependent infrastructure-related functions under one manager.
    - **DP4 – Ensure balanced span of authority** by reducing the span of authority of the current departmental structure.
    - **DP6 – Demonstrate that people are valued** by addressing a current workload issue.
    - **DP7 – Realistic & affordable** as this is a low-cost recommendation.

Implementation Considerations

- This recommendation can be implemented concurrent with Recommendation 5 and the revisions to the Manager, Community Services position.

Timing: Phase 2 Implementation

Recommendation 5

Revise the job description of the current Municipal Clerk position to become the Manager, Community Services (Municipal Clerk). This position will continue to report to the CAO with responsibility to manage legislative/clerk services, Council support, information/records management, bylaw compliance, communications/community engagement and recreation, facilities and parks; review workload after six months to determine if a shared Specialist, Communications & Community Engagement position is required. This position will continue to be part of the senior management team.

Actions Items

- Revise job description of the Manager, Community Services (Municipal Clerk) to add communications/community engagement and recreation, facilities & parks.
- Manager, Community Services (Municipal Clerk) to formalize an "office management" role in one of the administrative assistant positions.
- Monitor success and workload (six-month checkpoint) to determine if an additional communications resource is required.

Rationale / Anticipated Benefits

- Addresses a need identified by both Members of Council and staff to enhance the effectiveness of external communication and community engagement.
- Contributes to addressing the current workload and broad span of authority issue of the Manager of Operations and Community Services by shifting recreation, facilities and parks to another department.
- Aligned to the following Design Principles:
  - **DP1 - Contribute to achieving strategic priorities** by assigning responsibility to communicate strategic messages to the community.
  - **DP3 – Cluster functions based on strongest synergies** by pulling similar/dependent information management and communication functions into the same department.
  - **DP4 – Ensure balanced span of authority** by adding additional functions – bylaw enforcement and communications – to legislative services/Clerk functions to contribute to more balance among the five departments.
  - **DP7 – Realistic & affordable** as this is a low-cost recommendation.

Implementation Considerations

- There is a concern that adding a communications/community engagement role to the Manager, Community Services (Municipal Clerk) will result in a workload issue. This will have to be carefully monitored by the CAO.

Timing: Phase 2 Implementation

Recommendation 6

Create a shared Specialist, Asset Management position reporting to the Manager, Corporate Services (Treasurer) with responsibility to implement the Township's asset management strategy in compliance to statutory requirements.

Actions Items

- Council approval to fill this position.
- Develop a detailed job description based on the position summary included in this report.
- Advertise and hire this position.
- Establish dotted line reporting to Manager, Infrastructure & Development and Manager, Community Services to establish an asset management process between these departments and Corporate Services.

Rationale / Anticipated Benefits

- Address a functional gap that was identified in Phase 2: Current Assessment – Case for Change.
- Aligned to the following Design Principles:
    - **DP2 - Compliance to legal requirements** requires this position to ensure the organization meets its statutory asset management timelines.
    - **DP3 – Cluster functions based on strongest synergies** by embedding the asset management function in the same department as finance.
    - **DP7 – Realistic & affordable** – sharing this resource would avoid the cost of a dedicated Township resource.

Implementation Considerations

- Need to build a cross-department asset management process to ensure asset management drives budgets, resource allocation and decision-making.

Timing: Phase 1 Implementation

Recommendation 7

Work with Elgin County to add a shared Generalist, Human Resources position with the responsibility to create and implement progressive HR processes, policies, and practices to contribute to the Township being an "employer of choice". This position will report to the Manager, Corporate Services (Treasurer).

Actions Items

- Continue discussions with Elgin County with a greater sense of urgency to have a Generalist, HR in place within 3-4 months.
- Once the Generalist, HR is in place, assess the need to introduce health and safety-related policies and practices across the organization.

Rationale / Anticipated Benefits

- Widespread agreement among staff that the absence of a dedicated human resources professional has been a significant barrier to positive staff morale. Staff are very hesitant to approaching the CAO/Treasurer with any HR-related issues/concerns.
- Aligned to the following Design Principles:
    - **DP1 – Contribute to achieving strategic priorities** requires a focus on the Township's most important resource – its people.
    - **DP2 – Compliance to legal requirements** by ensuring a position that is dedicated to ensuring the Township is compliant to all labour laws.
    - **DP3 – Cluster functions based on strongest synergies** by embedding the HR function with similar corporate support services.
    - **DP6 – Demonstrate that people are valued** by providing staff access to a dedicated HR professional to help navigate workplace disputes; support training opportunities; and help career decisions.
    - **DP7 – Realistic & affordable** – sharing this resource with the County and its member municipalities would avoid the cost of a dedicated Township resource.

Implementation Considerations

- There is a level of urgency to implementing this recommendations. There was a widespread perception among staff that the absence of a dedicated human resources professional has contributed to low staff morale and high turnover rates.

Timing: Phase 1 Implementation

Recommendation 8

Add emergency planning function to the Fire Services Department and formalize the Fire Chief as the Community Emergency Management Coordinator (CEMC); rename this department "Fire & Emergency Services" under the Manager, Fire & Emergency Services (Fire Chief). This position will continue to report to the CAO.

Actions Items

- Revise job description of the Fire Chief to add emergency planning and CEMC duties.
- Identify a Township staff person(s) to administratively support this role and revise job description accordingly.

Rationale / Anticipated Benefits

- Emergency planning/preparedness was identified as a functional gap. Adding this function to the role of the Fire Chief is consistent with many other small-medium-sized municipalities.
- Aligned to the following Design Principles:
    - **DP2 - Compliance to legal requirements** by finding a "home" for this legal requirement.
    - **DP3 – Cluster functions based on strongest synergies** by merging functions requiring a similar level experience/skill.
    - **DP4 – Ensure balanced span of authority** by shifting this function away from the current Manager of Operations and Community Services.
    - **DP6 – Demonstrate that people are valued** by ensuring accountability to develop a plan to care for people in the case of an emergency.
    - **DP7 – Realistic & affordable** as this will be a low-cost recommendation.

Implementation Considerations

- There is expected to be some administrative help required to support the Manager, Fire & Emergency Services (Fire Chief).

Timing: Phase 2 Implementation

Recommendation 9

Initiate quarterly CAO/senior management team-led town hall sessions with all staff to build positive morale and ensure that all staff hear consistent messages from their leaders.

Actions Items

- Develop a Town Hall agenda for a 20–25-minute state-of-the-municipality update followed by a 20-25-minute question-answer period. The CAO should facilitate these Town Halls with the support of the senior management team.

Rationale / Anticipated Benefits

- There is a need to address low morale by introducing meaningful opportunities for staff to feel like they are all part of one team.
- Aligned to the following Design Principles:
    - **DP1 – Contribute to achieving strategic priorities** by inviting staff at all levels to contribute to solving problems and achieving goals.
    - **DP6 – Demonstrate that people are valued** by sharing corporate messages and inviting input.
    - **DP7 – Realistic & affordable** as this will be a low-cost recommendation.

Implementation Considerations

- Town Halls should not be more than 1-hr and could be a hybrid virtual and in-person event.
- This could be one of the first recommendations implemented. Thanking staff for their involvement in this organizational review would be a good theme for the first town hall.

Timing: Phase 1 Implementation

Recommendation 10

Provide mandatory "people management" training to all managers and supervisors.

Actions Items

- Generalist, HR to explore people management training options and schedule training for all managers and supervisors.

Rationale / Anticipated Benefits

- Several comments from staff indicate the need for managers and supervisors to receive better training on how to manage their people. Examples provided indicate the need for a higher level of respect and professionalism across the organization.
- Addresses the frustration raised by staff that supervisors/managers often do not follow the appropriate chain of command.
- Aligned to the following Design Principles:
    - **DP6 – Demonstrate that people are valued** by taking positive action in an area of concern that was raised by staff.

Implementation Considerations

- Best approach would be to require all managers/supervisors to take this training even though some managers/supervisor may already have very good people management skills.

Timing: Phase 1 Implementation

New Positions

Manager, Corporate Services (Treasurer)	This position reports to the CAO and is responsible for managing the Township's finances, technology systems and services, human resources, customer service, and transit administration. It is expected that, in addition to a financial background, this position will have strong project management and systems integration skills and experience. This position will be part of the senior management team.
Specialist, Asset Management (shared)	This shared position reports to the Manager, Corporate Services (Treasurer) and is responsible for delivering the Township's asset management program in compliance to provincial legislation.
Generalist, Human Resources (shared)	This position reports to the Manager, Corporate Services (Treasurer) and is a shared resource that is responsible to create and manage the Township's human resources policies, programs and practices.
Specialist, Communications & Community Engagement (potential future shared position)	If demand continues for enhanced communications and community engagement continues to increase, there may be a need for this shared position. This position would report to the Manager, Legislative Services (Municipal Clerk) and be responsible for delivering external communications and community outreach services.

Revised Positions

CAO	Reporting to Council, the CAO is responsible to manage all municipal operations and staff. In addition to the four manager direct reports, the CAO is also responsible to manage economic development and business relations.
Manager, Infrastructure & Development Services	This position continues to report to the CAO. Revisions to this position include adding oversight of the planning and building inspection functions and removing recreation/leisure/culture programming and facility/parks operations and maintenance.
Manager, Community Services (Municipal Clerk)	This position continues to report to the CAO. Revisions to this position include adding oversight of the bylaw compliance functions, external communications/community engagement function, and recreation, facilities and parks.
Manager, Fire & Emergency Services (shared Fire Chief)	This position continues to report to the CAO. Revisions to this position include adding emergency management planning for the Township and revising the position title to reflect this additional responsibility. Manager, Fire & Emergency Services will become the CEMC.
Supervisor, Public Works	This position will report to the Manager, Infrastructure & Development Services. Revisions to this position include adding the Landfill Operator and Superintendent, Drains to report into this Supervisor position.
Supervisor, Recreation, Facilities & Parks	This position would report to the Manager, Community Services (Clerk) with the responsibility for the Township's recreation, facilities, and parks.

3.0 Towards Implementation

- **Establish an internal implementation project lead and team**. Step one is to identify the team that will oversee the implementation of the recommendations. It is essential that the CAO is the executive lead of this team providing direction and ongoing senior-level support. Ensuring successful implementation requires an appropriate level of focus/attention.

- **Communicate (e.g. Staff Town Hall) a simple and positive initial message**. First step of the implementation project team is to create a succinct, simple and positive message sent to all staff from the CAO that addresses the following:
    - Firstly, thanking staff for their valuable input in this project over the past few months.
    - Restate the purpose of this project and provide positive rationale for the upcoming changes.
    - Identify who is leading the implementation process.
    - Provide estimated implementation timelines.
    - Confirm that there will be opportunities for staff involvement.

- **Establish a detailed project plan**. Expand Linton Consulting's high-level implementation plan to establish a detailed project plan that includes decision milestones and internal communications activities. This project plan should also include the following types of activities:
    - Identify and document shifts in staff roles, responsibilities and lines of reporting.
    - Training/coaching requirements for staff who have experienced change.
    - Ongoing touchpoints (formal and informal) between staff experiencing change and management to proactively manage change and contribute to a positive staff morale.
    - Issues mitigation/management process.

- **Ongoing Staff Feedback/Input Process**. Recognizing that change is difficult for staff, consider establishing a process for staff to communicate any concerns or issues throughout the implementation process.

- **Tracking/Communicating Progress**. Key role of the Project Lead is to track progress against project plan timelines. Celebrating success and identifying barriers to implementation progress will be a critical success factor for successful implementation. Successfully implementing a few quick wins will build positive momentum for the project.

Implementation Phases

❑ Successfully implementing the recommendations and action items requires a phased approach that recognizes the reality of limited resources and budgets:

- **Phase 1: Quick Wins** (within 6 months) – focusses on making some immediate improvements to address urgent issues/challenges and build positive momentum for change.

- **Phase 2: Building Capacity** (within 1 year) - addresses increased demand from community growth by building internal capacity to deliver.

Phase 1: Quick Wins

R10: Facilitate first CAO-led staff town hall

R1: Formalize 3-level leadership model

R2: Establish a 4-department model with timelines to add manager-level positions

R3: Create and fill Manager, Corporate Services (Treasurer) position

R6: Create and fill the shared Specialist, Asset Management position

R7: Move forward with a shared Generalist, HR position in partnership with Elgin County

R10: Provide mandatory "people management" training for all managers and supervisors

Phase 2: Building Capacity

R4: Revise the Manager of Operations & Community Services to become the Manager, Infrastructure & Development Services

R5: Revise the Municipal Clerk position to become the Manager, Community Services (Municipal Clerk)

R8: Add emergency planning to the Fire Services Department and formalize the Fire Chief as the CEMC

Phase 1 Action Items	When?	Who 'owns' this?	Who else is involved?	Staff Impacts
Establish Project Lead and Project Team (this could be the CAO and senior management team)	▪ Early 2024	• CAO	▪ Senior management team	▪ n/a
Create a detailed project plan with timelines, milestones and who does what	▪ Early 2024	▪ CAO	▪ Senior management team	▪ n/a
R10 – facilitate the first CAO-led Town Hall thanking staff for their involvement in the organizational review and presenting implementation approach and timelines; provide an opportunity for questions/answers	▪ Early 2024	▪ CAO	▪ Senior management team	▪ n/a
R1 & R2 – get Council approval to move ahead with a future state 3-level leadership and 4-department future state model	▪ Early 2024	▪ CAO	▪ Council ▪ Senior management team	▪ Several position title changes
R3 – Council approval for a Manager, Corporate Services (Treasurer) position; create job description; advertise and fill this position	▪ Early 2024	▪ CAO	▪ Council ▪ Senior management team	▪ New manager position
R4 – Council approval for a shared Specialist, Asset Management position; create job description; advertise and fill this position	▪ Mid-2024	▪ Manager, Corporate Services	▪ Council ▪ CAO	▪ New specialist position
R8 – Move forward with a shared Generalist, HR position in partnership with Elgin County	▪ Mid-2024	▪ Manager, Corporate Services	▪ CAO ▪ Senior management team	▪ New position (shared)
R11 – Provide mandator "people management" training for all managers and supervisors	▪ Mid-2024	▪ Manager, Corporate Services	▪ CAO ▪ Generalist, HR	▪ n/a

Phase 2 Action Items	When?	Who 'owns' this?	Who else is involved?	Staff Impacts
R5 - Revise the Manager of Operations & Community Services to become the Manager, Infrastructure & Development Services	▪ Mid-2024	▪ CAO	▪ Senior management team	▪ n/a
R6 - Revise the Municipal Clerk position to become the Manager, Community Services (Municipal Clerk)	▪ Mid-2024	▪ CAO	▪ Senior management team	▪ n/a
R9 - Add emergency planning to the Fire Services Department and formalize the Fire Chief as the CEMC; assign an administrative assistant position to support the Manager, Fire & Emergency Services	▪ Late-2024	▪ CAO	▪ Manager, Fire & Emergency Services	• Revised position title

Appendix: Current Assessment – Case for Change

October 23, 2023

Table of Contents

Introduction

Summary of Key Findings

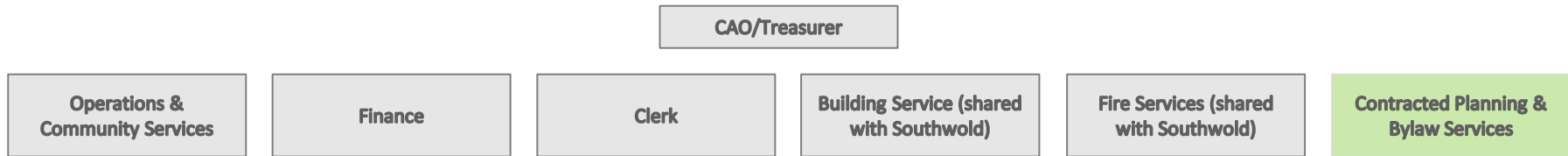**Towards Recommendations**

Introduction

Context
Phased Approach
Case for Change Overview
Current State Functional Model

About West Elgin

❑ With a population of approximately 5,000 residents and 322 square kilometers, West Elgin is a rural municipality within Elgin County. Rodney and West Lorne are the two main population centres with several smaller communities. The Municipality is governed by a Mayor, Deputy Mayor, and three Councillors.

❑ Providing a range of services, the Municipality of West Elgin is organized into the following departments/business units.

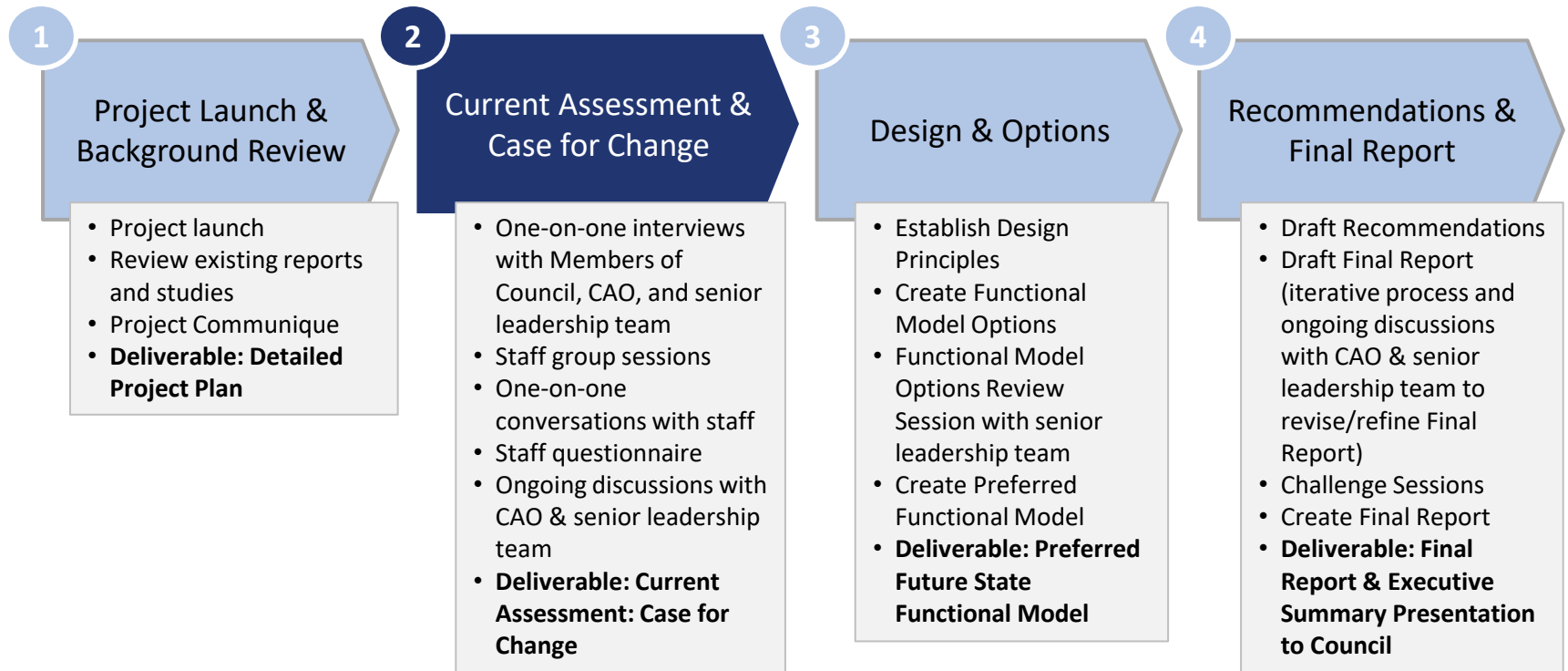| CAO/Treasurer					
Operations & Community Services	Finance	Clerk	Building Service (shared with Southwold)	Fire Services (shared with Southwold)	Contracted Planning & Bylaw Services

Project Purpose & Deliverables

❑ The purpose of this project is to complete an organizational review assess the current structure, processes, systems, and performance of the Municipality.

❑ The Project will result in a Final Report outlining the findings and recommendations addressing the full scope of the review. This Final Report will include:

– A recommended organizational chart with reporting relationships and staffing levels and positions within departments.

– Design Principles to evaluate proposed organizational design options.

– High-Level Future State Functional Model as the foundation for detailed organizational change recommendations.

– High-level job designs as the starting point for new/revised job descriptions.

– A phased implementation plan with associated timelines and milestones.

Phased Approach

From Findings to Recommendations

❑ The below process will be used to transition from findings to recommendations:

1 — **Project Launch & Background Review**

- Project launch
- Review existing reports and studies
- Project Communique
- **Deliverable: Detailed Project Plan**

2 — **Current Assessment & Case for Change**

- One-on-one interviews with Members of Council, CAO, and senior leadership team
- Staff group sessions
- One-on-one conversations with staff
- Staff questionnaire
- Ongoing discussions with CAO & senior leadership team
- **Deliverable: Current Assessment: Case for Change**

3 — **Design & Options**

- Establish Design Principles
- Create Functional Model Options
- Functional Model Options Review Session with senior leadership team
- Create Preferred Functional Model
- **Deliverable: Preferred Future State Functional Model**

4 — **Recommendations & Final Report**

- Draft Recommendations
- Draft Final Report (iterative process and ongoing discussions with CAO & senior leadership team to revise/refine Final Report)
- Challenge Sessions
- Create Final Report
- **Deliverable: Final Report & Executive Summary Presentation to Council**

Collaborative Process

❑ A highly collaborative, investigative approach was utilized to complete this fact-finding phase, including:

- Review of existing documents, including organizational charts, job descriptions, and other relevant documents;
- One-on-one in-person interviews with Members of Council (Aug 31):
- Project Launch with senior team (Sept 6);
- One-on-one in-person interviews with senior team (Sept 6);
- Staff questionnaire (Sept 11 – Oct 11) (10 responses);
- Staff virtual "office hours" (Sept 25/26) (23 meetings);
- Three in-person staff sessions (21 participants) (Oct 4); and
- Phase 2 review/approval working session (Oct 23).

Theme Areas

❑ This section represents Linton Consulting's synthesis/interpretation of findings that have been compiled from a variety of sources, including the review of documents/reports, common themes/findings from the one-on-one interviews, group sessions, and staff questionnaire responses.

❑ These findings have been categorized into the following themes:

1. Leadership & Decision-Making
2. Customer Service & External Communication
3. Teamwork & Collaboration
4. Roles, Responsibilities & Workload
5. Succession Planning & Staff Morale

The "Big Picture"

❑ The below Current State Functional Model outlines the core functions by business unit:

CAO/Treasurer

- Council liaison/manage relationship
- Establish strategic and operational priorities
- Financial management/oversight
- Operational/staff management/oversight
- Leadership/decision-making
- Human resources

Operations & Community Services

Public Works
- Public works and roads
- Facilities & fleet management/ maintenance
- Waste management and landfill

Parks & Recreation
- Recreational facilities & services

Utilities
- Water meters
- Manage partnership with Ontario Clean Water Agency

Municipal Drainage
- Manage municipal drainage program

Port Glasgow Trailer Park
- Maintain and manage trailer park

Clerk

- Council support
- Legislated services including elections
- Records/document management
- FOI requests

Finance

- Long-term financial management
- Annual capital and operating budget
- Asset management
- Property taxes
- Accounting, accounts payable and receivable
- Insurance and risk management
- Payroll
- Reception & customer service

Fire Services

- Fire suppression
- Training
- Communications / education

Other Functions
(report to CAO/Treasurer)

- Building inspections (shared service)
- Planning (contracted out)
- Transit (bus drivers)
- Bylaw compliance (contracted out)
- Service Ontario

Summary of Key Findings

Leadership & Decision-Making
Customer Service & External Communication
Teamwork & Collaboration
Roles, Responsibilities & Workload
Succession Planning & Staff Morale

a) Widespread agreement from both Members of Council and the senior team that Council-staff relationship is a positive one characterized by mutual respect. There was some concern expressed by a few Councillors that at times staff are making some decisions that should be made by Council.

b) Strong support among Council for this project and the recommended changes to better position the municipality for the future. A couple Councillors mentioned that this project was "urgent".

c) Concern expressed by several Councillors and the senior team that the joint CAO/Treasurer role is an issue, and this dual role is not sustainable.

d) 21 staff participated in the October 4th group sessions. The top responses to the question "What words/phrases describe your perception of overall leadership and decision-making at West Elgin?

   – Micro-managing

   – Last-minute decisions

   – Need for more "supervising people" training

   – Distant / not available / not listening

   – "Just figure it out" is a common phrase

e) 23 one-on-one staff interviews were conducted. Common themes that emerged related to leadership/decision-making include:

   – Widespread perception is that the CAO/Treasurer has too much on her plate contributing to tension in the office.

   – Conflict among the senior team has been witnessed by several staff.

   – Concern that appropriate "chain of command" is sometimes not followed, and staff receive conflicting direction from their immediate supervisors versus senior management.

f) Agreement among the senior team and staff, that the CAO and senior managers are too involved in day-to-day supervision to provide strategic leadership or mentor their direct reports.

a) There is some agreement among Members of Council that while there has been some improvement, external communication could be enhanced.

b) There is also a desire among some Councillors to have more regular/formal communication between staff and Council so that Councillors are better prepared to respond to constituents' questions/concerns.

c) Common themes that emerged from one-on-one staff interviews related to customer service and external communication include:

– Need to improve external communication to ensure residents get consistent, accurate information in a timely fashion (e.g. floods)

– Significant turnover makes it challenging for staff to receive the appropriate level of customer service training.

d) At the staff session, several participants said that it is not uncommon for them to hear more about what the municipality is doing from the media and in the community rather than from internal communication. Staff indicated that they would prefer to be able to share news about the municipality with their friends and neighbours rather than feel like they are out of the loop.

e) Staff session participants felt that the reputation of the municipality is less positive now than it was 10 years ago.

f) Overall, Citywide software has improved the citizen complaint and work order process. However, there is an opportunity to optimize the effectiveness and consistency of this tool. Members of Council also expressed concern that sometimes they are not kept in the loop when a complaint has been addressed.

a) Unanimous agreement among Members of Council they have a positive and respectful relationship with each other, and they feel like they work together for the good of the community.

b) Responses from the Staff Questionnaire and one-on-one staff interviews suggest that there is good teamwork among staff, especially when there is a sense of urgency or there is a tight deadline.

c) Positive comments from staff about the internal emails they receive from both the CAO/Treasurer and the Manager of Operations and Community Services.

d) Comments from part-time firefighters indicate that there is a good level of teamwork and collaboration within the department.

e) Several comments from staff that suggest the need for supervisors to receive better training on how to manage their people. Examples provided indicate the need for a higher level of respect and professionalism related to staff management.

f) Frustration expressed by staff when the proper chain of command is not followed, and they receive conflicting direction from their superiors.

g) Comments from the staff group session to the question "What words/phrases would you use to describe internal communication?" included "poor", "lack of" and "limited detail provided".

a) Concern expressed by several Members of Council and the senior team that the joint CAO/Treasurer role is an issue, and this dual role is not sustainable.

b) Concern expressed by several Members of Council in the lack of clarity on who does what. Perception is that there is a need to establish clear parameters when it comes to roles and responsibilities.

c) Widespread agreement among management, staff and Councillors that the workload of the CAO/Treasurer and senior managers is too heavy, and as a result, they are not able to provide strategic leadership or mentor their direct reports. Several staff pointed out that the CAO/Treasurer and senior managers are performing duties that should be done by their staff (e.g. folding resident mail-outs).

d) Based on comments from the staff questionnaire, staff group session, Council/senior staff interviews and one-on-one staff questionnaires, there are several role gaps:

    – Human resources – concern raised by both Councillors and staff that the municipality does not have a dedicated HR professional to handle personal/sensitive HR issues.

    – Communications / public engagement – Councillors and staff identified a need to improve the level of community communication and engagement.

    – Health and safety – some concern raised by staff about the lack of capacity to mitigate health and safety risks.

    – Office management – concern raised by senior management and staff about the need for more effective day-to-day office management.

    – Asset management – several mentioned the need for additional asset management expertise/experience.

    – IT support services – identified by several staff as being an area of need.

    – Records management – constant staff turnover has led to lack of momentum in improving the municipality's records/document management system/process.

a) Positive comments about the Fire Department when it comes to morale, internal communication and training opportunities.

b) Positive comments from several recent hires that the municipality is a great place to work, and that the management team has been very supportive and helpful.

c) The municipality's low staff retention rate was identified by Councillors, managers and staff as one of the most critical issues facing the municipality. While rate of pay was identified as a major cause, poor staff morale and interpersonal conflicts were also mentioned.

d) A perception expressed by both Councillors and staff that the absence of a qualified human resources professional is contributing to poor staff morale.

e) Results from the staff questionnaire question "Rate the current level of motivation & enthusiasm among staff members that you frequently work with.":

   – Exceptional – 22%

   – Good – 11%

   – Fair – 56%

   – Poor - 11%

f) Results from the staff questionnaire question "Rate your opportunities for growth, learning and career development.":

   – Exceptional – 11%

   – Good – 22%

   – Fair – 56%

   – Poor – 11%

g) Common themes/phrases/words related to staff morale from the one-on-one staff interviews including the following:

   – Feelings of tension in the workplace / "walking on eggshells"

   – Feel micro-managed

   – Not treated with respect / treated "like a child"

   – Not listened to / ideas not welcomed

Towards Recommendations

Design Principles
Direction for Recommending Change

❑ In addition to addressing the current operational challenges, it is important for organizational realignment to be based on recognized principles of good organizational design to ensure long-term organizational effectiveness. The below Design Principles will be used as the tool to create and evaluate functional model options:

1. **Contribute to Achieving Strategic Priorities**. Organizational change must provide a solid foundation to ensure the municipality is positioned to deliver results based on strategic priorities.

2. **Compliance to Legal Requirements**. Organizational change must ensure the municipality has the capacity to comply with their statutory requirements.

3. **Cluster Functions Based on their Strongest Synergies**. Organizational changes need to cluster functions based on the strongest synergies and dependencies while contributing to effective teamwork.

4. **Ensure Balanced Span of Authority**. Organizational changes need to be consistent with the best practice of balanced spans of authority across the organization, both from a perspective of number of staff and number of functional areas.

5. **Contribute to Citizen-Focused Service Delivery**. Organizational changes should enhance the capacity of the municipality to provide services in an accessible, responsive and timely manner.

6. **Demonstrate That People Are Valued**. Organizational changes should contribute to improvements to employee engagement and provide opportunities for career progression.

7. **Realistic & Affordable**. Organizational changes need to be achievable. Conceptual models may look good on paper, but if implementation success is improbable, the changes should not be attempted.

❑   The direction for recommended organizational change will include the following three inputs:

1. **Address current organizational challenges** – it is essential that the corporate organizational structure addresses real operational issues/challenges. The Current Assessment Phase included input from management and staff through one-on-one interviews, group sessions and an online staff questionnaire. The key findings were synthesized and summarized into the following categories:

   a) Leadership & Decision-Making

   b) Customer Service & External Communication

   c) Teamwork & Collaboration

   d) Roles, Responsibilities & Workload

   e) Succession Planning & Staff Morale

2. **Consistent with recognized good practices in organizational design principles** - a series of principles will be developed by Linton Consulting and the senior team to guide the design phase. These principles were based on a combination of Linton Consulting's experience with good practices in organizational design and the senior management team's solid understanding of current organizational challenges and future opportunities. These principles will be used to evaluate the features of several model options.

3. **Active participation and input from the CAO, senior management team and staff.** Based on the above inputs, a draft Preferred Functional Model will be developed for input/revision by the CAO and senior management team. Linton Consulting may also facilitate staff Challenge Sessions resulting in further revisions to recommended changes.