



HALDIMAND COUNTY

**Report PED-GM-06-2015
of the General Manager of Planning and Economic
Development
For Consideration by Council in Committee**

RE: Administrative Buildings Accommodation Review Process

OBJECTIVE: To obtain Council approval of a framework to evaluate alternative administrative accommodation service delivery frameworks.

RECOMMENDATIONS:

1. THAT Report PED-GM-06-2015 Re: Administrative Buildings Accommodation Review Process dated July 22, 2015 be received;
2. AND THAT Council endorse the project scope, timing, decision making principles, evaluation criteria and the service delivery options as set out in Attachment 1 to Report PED-GM-06-2015 Re: Administrative Buildings Accommodation Review Process;
3. AND THAT Council authorize a project budget of \$25,000 to be funded from the Capital Replacement Reserve - General.

Respectfully submitted:

Approved:

Craig Manley, MCIP, RPP
General Manager
Planning & Economic Development
Department
Date: July 22, 2015

Donald G. Boyle
Chief Administrative Officer

BACKGROUND:

One of the identified 2014 - 2018 Term of Council priorities adopted by Council (see Report CAO-02-2015 approved July 6th, 2015) relates to the issue of conducting an Accommodation Review of the administrative locations of the County – essentially examining the current dispersed physical service delivery model relative to the feasibility of consolidating administrative functions in fewer locations through a more centralized service delivery model. The key drivers for this review include increasing operational efficiency, maintaining customer service levels and reducing operational costs.

The current 'dispersed' service delivery model was established by the Transition Board in 2000 when Haldimand County was being created. This involved identifying the Cayuga Administrative Building as the main administrative office with de-centralized offices housing customer service centres and where one or more 'sections' of a municipal department are located.

The key rationale for selecting this service delivery model included:

- Cost containment – using existing facilities rather than incurring costs for new construction;
- The public awareness and familiarity of existing office locations;
- The ability to address the public's expectations, as expressed at that time, that *'some portion of their existing local government services/departments would remain in their immediate area'*;
- The Cayuga Administrative Building was selected as the main administrative location due to its central location in the County, its condition and ability to hold Council meetings and *'the strong historic ties within Haldimand with the building being easily located, identifiable and familiar to the vast majority of the population'*;
- At all facilities except Kohler, it was intended that a *'one-stop shop' philosophy be implemented that would enable citizens to pay bills, fines and make application for various services'* via front-line customer service representatives.

This dispersed service delivery model has been implemented over the past 15 years in a variety of iterations.

Currently administrative functions are provided as follows:

Facility	Total Sq. Ft.	Office Sq. Ft.	Support Space Sq. Ft.	Wkstns/ Location	Total Sq. Ft./ Wkstn	Office Sq. Ft./ Wkstn	Support Space Sq. Ft./ Wkstn
<i>County Administration</i>							
Cayuga Administration Building	18485	10910	7575	74	250	147	102
Caledonia Satellite Office	7250	4425	2825	31	234	143	91
Dunnville Multipurpose Facility	12400	1700	10700	0	n/a	n/a	n/a
Dunnville Satellite Office	5195	2655	2540	19	273	140	134
Haldimand County Caledonia Centre	1858	1620	238	12	155	135	20
Hagersville Satellite Office	2650	1530	1120	12	221	128	93
Kohler Satellite Office	3555	2090	1465	21	169	100	70
<i>Sub-total County Administrative Space</i>	51393	24930	26463	169			
<i>Average Space/Wkstn.</i>					217	132	85
<i>Third Party Space</i>							
*Caledonia Satellite Office - Health Unit	2370	2010	360	21	113	96	17
Dunnville Multipurpose Facility - H&SS	2600	2370	230	16	163	148	14
Caledonia Satellite Office - OPP	380	0	380	n/a	n/a	n/a	n/a
Dunnville Multipurpose Facility - OPP	700	0	700	n/a	n/a	n/a	n/a
Hagersville Satellite Office - OPP	190	0	190	n/a	n/a	n/a	n/a
<i>Sub-total Third Party Space</i>	6240	4380	1860	37			
TOTAL	57633	29310	28323	206			

**In addition to the above space allocations, Social Services also rents non-County space in Caledonia.*

The purpose of this report is to set out for Council approval the proposed project scope, timing, accommodation options and evaluation criteria associated with three models of service delivery: decentralized, consolidation into one community in multiple facilities or consolidation into one community in one facility.

ANALYSIS:

Attachment 1 contains the Project Scope document for which staff is seeking Council endorsement to address the following matters:

Project Scope – what the project is about and not about, and the outcome of the initiative:

- As envisioned the project is intended to provide Council with an objective analysis of 3 general service delivery options relative to established decision making principles and evaluation criteria. Within the general service delivery options some limited alternatives will be evaluated;
- It also would provide Council a summary of input relative to the options from community and staff stakeholders;
- The project outcome would be a decision with respect to the preferred service delivery model and the selection of one particular option.

Work Process and Timing – key steps in the process and sequencing of those steps:

- It is intended to provide Council with the options analysis by the end of 2015 and to provide a stakeholder comment period prior to Council making its decision;
- The timing is intended to provide for an accommodation decision in advance of the 2016 Budget deliberations.

Key Decision Principles – fundamental objectives that each alternative service delivery option would be considered against as set out below:

1. The decision must further the County's Strategic Principles;
2. The decision will support and facilitate the implementation of the County's adopted 'Way of Work' standards (See **Attachment 2**);
3. The decision should provide fair and equitable access to County services for residents, businesses and investors – (the ability to get service);
4. The physical location of County services where face to face interaction is provided will generally be available within a reasonable and similar driving distance from the majority of the County population;
5. Improved overall customer service for residents and businesses will be the result (access to service, minimization of number of visits, comprehensive service);
6. Increased functionality and administrative operational efficiencies in terms of service delivery will be achieved;
7. Long term cost effectiveness will be demonstrated (i.e. rationalization of operational and capital investments);
8. The decision will promote 'open local government' and should meet the needs of clients in terms of spaces that allow privacy and confidentiality, dignity, accessibility, and which reduces potential conflicts between uses and users (i.e. noise, safety);
9. The decision should result in an accommodation option that is flexible to respond to change over time (changes in services provided, growth and demographic changes,

- new organizational structures, evolving technology and business continuity during emergencies);
10. The decision will provide a professional work environment for staff that contributes to high performance, good morale, employee wellness and retention/recruitment.

Evaluation Metrics – criteria that will be used to evaluate the relative strengths and weaknesses of the accommodation options to allow comparison under the following headings:

- Financial Analysis
- Efficiencies Achieved
- Impact on Customer Service
- Impact on Corporate Image
- Work Environment Quality

Accommodation Options:

As noted above, the current gross floor area of 57,600 square feet accommodates 169 staff workspaces associated with direct County services plus 37 workspaces used by third party services (i.e. Social Services, Health Unit) as well as meeting rooms, utility and storage space and common areas. The accommodation options to be evaluated include consideration of long term administrative space needs, accommodation of third party services, efficiencies associated with co-location and ancillary space needs including meeting rooms, utility and storage space, common areas and parking. At a high level under each of the proposed accommodation options, it is technically feasible to meet the required administrative space needs of the County in the long term.

The proposed Accommodation Options to be critically evaluated prior to Council making a decision are as follows:

Modified Status Quo:

Retain a decentralized service delivery model that retains administrative offices and/or customer service centres in the major communities. Undertake minor building rationalization / consolidation improvements and implement customer service technology enhancements over time to enhance self-service opportunities.

Partial Consolidation:

Eliminate Satellite Administrative Offices, retain and repair the Cayuga Administrative Building and build additional space in Cayuga to consolidate administrative functions in one community using multiple facilities. The additional space could either be on existing County land or purchased property. Consider adjacency improvements when deciding what functions go where. Implement technology enhancements to provide local self-service opportunities.

Full Consolidation:

Consolidate and co-locate administrative functions in one new purpose built administrative centre. Implement technology enhancements to provide local self-service opportunities.

Details associated with each high level option are contained in **Attachment 1**.

BUDGET/LEGAL IMPLICATIONS:

Attachment 1 includes the various research and work packages that are required to undertake the necessary due diligence to analyze the foregoing options. While the majority of the work can be undertaken 'in-house' using existing staff resources, there may be some minor costs associated with building condition assessment, high level design and construction cost estimating of the alternatives. Council is requested to approve \$25,000 from the Capital Replacement Reserve - General to allow for technical assistance if required.

INTERDEPARTMENTAL IMPACTS:

Attachment 1 outlines the various staff involved in this initiative as well as their role and responsibility. This initiative will require significant staff resources to complete and will impact Departmental work plans.

LINKS TO STRATEGIC PLANS:

This initiative forms a high priority matter as set out for 2015 in Council's adopted Term of Council Priorities.

CONCLUSION:

Council has directed through its adopted Term of Council Priorities that alternative administrative accommodation options be considered. This report outlines a structured process designed to examine, evaluate and measure alternative service delivery models relative to each other and to get input from stakeholders relative to an accommodation decision. Council is requested to approve the project scope, timing, decision making principles, evaluation criteria and the service delivery options that will be considered.

ATTACHMENTS:

1. 2015 Administrative Buildings Accommodation Review Project Scope document.
2. Adopted Way of Work Standards for Haldimand County.

REQUIRED AND RECEIVED COMMENTS FROM: Yes or Not applicable	
Clerk's	Not applicable
Community Services Department	Not applicable
Finance	Yes
Health & Social Services Department	Not applicable
Human Resources	Not applicable
Information Systems	Not applicable
Legal	Not applicable
Public Works Department	Not applicable
Planning & Economic Development Department	Not applicable
Support Services	Yes
Other	Not applicable

CLERK'S DIVISION REVIEW Report: PED-GM-06-2015 – Administrative Buildings Accommodation Review Process	
COUNCIL IN COMMITTEE: RECOMMENDATION NO <input type="checkbox"/> Approved <input type="checkbox"/> Approved with Amendments <input type="checkbox"/> Defeated <input type="checkbox"/> Deferred <input type="checkbox"/> Other <input type="text"/>	COUNCIL: RESOLUTION NO: <input type="checkbox"/> Approved <input type="checkbox"/> Approved with Amendments (Noted below) <input type="checkbox"/> Defeated <input type="checkbox"/> Deferred <input type="checkbox"/> Other <input type="text"/>
Amended Recommendation(s):	
Council Direction:	
Clerk's Division Action Taken:	

Administrative Buildings Accommodation Review

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GOALS:	TIMELINE
<p>To obtain a Council decision with respect to consolidating municipal administrative functions in fewer locations.</p> <p>To evaluate the feasibility to move from a decentralized service delivery model to a more centralized model.</p>	<p>June – Dec 2015</p>
SCOPE	
<p>Includes:</p> <ul style="list-style-type: none"> • Identification of the Key Administrative Services affected including 3rd party local services (OPP, Health and Social Services, POA) • Community location(s) where administrative services are to be provided • Development of Alternative Accommodation Delivery Options (<i>as attached</i>) <ul style="list-style-type: none"> ○ Modified Status Quo – decentralized model (two sub-options to be provided) ○ Partial Consolidation – close local administrative offices and consolidate services to one community using multiple County buildings (additions to existing County property to be evaluated for feasibility) ○ Full consolidation – close local administrative offices and build one administrative centre • Establishment of Key Decision Principles that will guide the evaluation of options – (<i>see attached</i>) • Establishment of Evaluation Metrics for the Options to include: (<i>see attached</i>) <ul style="list-style-type: none"> ○ Financial Analysis ○ Efficiencies Achieved ○ Impact on Customer Service ○ Impact on Corporate Image ○ Work Environment Quality • Research with respect to assessing the options relative to Evaluation Metrics (<i>see attached work packages</i>) • Initial Report/Workshop with Council to obtain approval of Project Scope, Process & Timing, Key Decision Principles, Evaluation Metrics and Options to be considered • Report/Workshop with Council regarding Project Scope, Process & Timing, Key Principles & Evaluation Criteria • Stakeholder Engagement – Community (Public, Chambers, BIA's), Staff 	

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<ul style="list-style-type: none"> • Final Report/Workshop with Council regarding comparison of options relative to Key Decision Principles and Evaluation Metrics, at a high level order of magnitude cost evaluation and qualitative analysis (positive, negative or neutral basis); Identification of Staff recommended option • Council Decision regarding preferred option – “go” or “no go” <p>Excludes:</p> <ul style="list-style-type: none"> • Building design, budget approval, tendering and construction • Comprehensive Facilities Review relating to non-administrative municipal buildings – museums, community halls, yards, libraries, etc. • Service Review or Organizational Review of Services • Specific property location for consolidated option 		
PROJECT OBJECTIVES		
<ul style="list-style-type: none"> • Addressing a Corporate Term of Council Initiative within Council’s desired timeline • Applying a principled based decision approach – the decision is transparent and traceable • The analytics and business case used for evaluation is appropriate and defensible • Proactive communications are employed to ensure Council, Staff and the community are informed throughout the project • Strong Council support for selected option is achieved • Staff collaboration and growth and development opportunities 		
SPONSOR		
Chief Administrative Officer – to provide resources for project and primary political interface		
LEAD		
GM – PED		
STRATEGIC COMMITTEE	NAME	ROLE
Decision making influence of key delivery or services	Craig Manley, General Manager PED Hugh Hanly, General Manager Community Services Karen General, General Manager Corporate Services	<ul style="list-style-type: none"> • Project Management & Stakeholder Engagement • Construction, Building Assets, Accessibility • Financial Planning, Local Knowledge, Information Technology

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	<p>Don Boyle – CAO</p> <p>Cathy Case</p>	<ul style="list-style-type: none"> • Political Environment • Project Coordination / Link to Working Group/Support Staff
WORKING COMMITTEE		
<p>Skills, knowledge, expertise, experience</p>	<p>Cathy Case</p> <p>Financial Analyst - Tania Comeau</p> <p>Craig Manley</p> <p>Jill Shea</p>	<ul style="list-style-type: none"> • Customer Service & Staff Engagement & Coordination of Research • Costing of Options, Financial Research • Advice • Project Communications & Branding
SUPPORT		
<p>Short term expertise/input</p>	<p>GIS Coordinator – GIS Spatial Analysis</p> <p>Financial Supervisor/Manager – Truthing of Cost Analysis, Development of Financial Evaluation model</p> <p>Manager, Information Systems – Evaluation of Technology implications of options</p> <p>Human Resources – Staff work locations</p> <p>Manager, Facilities & Parks Operations – Building conditions, construction</p>	

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KEY COMMUNICATION MESSAGES	
1.	Project is a key Council Priority.
2.	Project is primarily about achieving efficiency of service delivery and improving customer service - builds on other efficiency measures.
3.	Key stakeholders (staff, community) will have the opportunity for real input into options evaluation.
4.	It is an evaluation of how administrative services are delivered rather than a service level review or a staff reduction exercise.

WORK PROCESS AND TIMING

KEY MILESTONE/WORK PACKAGE	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	2016
PRE-PROJECT PLANNING								
PROJECT KICK-OFF		X						
COMMUNICATION TO STAFF		X						
COUNCIL APPROVAL OF PROJECT SCOPE/PRINCIPLES			X					
COMMUNICATION TO COMMUNITY STAKEHOLDERS			X					
BACKGROUND RESEARCH								
COUNCIL WORKSHOP/STAFF RECOMMENDATIONS						X		
COMMUNITY COMMENT PERIOD								
COUNCIL DECISION								X

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KEY DECISION PRINCIPLES: (these will drive the decision by allowing the alternative accommodation options to be rated on a scale of worse, neutral, better or best relative to these principles)

A Council decision on any selected option will be measured on the ability to achieve the following key principles:

1. The decision must further the County's Strategic Principles;
2. The decision will support and facilitate the implementation of the County's adopted 'Way of Work' standards;
3. The decision should provide fair and equitable access to County services for residents, businesses and investors – (the ability to get service);
4. The physical location of County services, where face to face interaction is provided, will generally be available within a reasonable and similar driving distance from the majority of the County's population;
5. Improved overall customer service for residents and businesses will be the result (access to service, minimization of number of visits, comprehensive service);
6. Increased functionality and administrative operational efficiencies in terms of service delivery will be achieved;
7. Long term cost effectiveness will be demonstrated (i.e. rationalization of operational and capital investments);
8. The decision will promote 'open local government' and should meet the needs of clients in terms of spaces that allow privacy and confidentiality, dignity, accessibility, and which reduce potential conflicts between uses and users (i.e. noise, safety);
9. The decision should result in an accommodation option that is flexible to respond to change over time (changes in services provided, growth and demographic changes, new organizational structures, evolving technology and business continuity during emergencies);
10. The decision will provide a professional work environment for staff that contributes to high performance, good morale, employee wellness and retention/recruitment.

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EVALUATION METRICS FOR OPTIONS

FINANCIAL ANALYSIS: (HIGH LEVEL FINANCIAL CALCULATIONS)

AMORTIZATION TIMEFRAME: 20 YEARS

CAPITAL COSTS:

- NEW CONSTRUCTION (including land, furniture, equipment and technology)
- RENOVATIONS
- DEMOLITION


REVENUES:

- CURRENT CAPITAL FUNDING
- ANY ALLOCATED CVF

NET CAPITAL FUNDS REQUIRED

TRANSITION COSTS (lease costs, moving expenses, one-time employment costs)

ANNUAL OPERATING COSTS / (SAVINGS):

- UTILITIES & MAINTENANCE & CLEANING
 - TRAVEL
 - STAFFING
 - TECHNOLOGY
 - FLEET
 - DEBT FINANCING
 - INSURANCE
 - REVENUE FROM SURPLUS FACILITIES (Property Sales or Lease of Space to external 3rd parties)
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EVALUATION METRICS FOR OPTIONS

EFFICIENCIES: (CALCULATED & QUALITATIVE (Positive, Neutral, Negative))

PHYSICAL ADJACENCIES: SYNERGIES THAT PROMOTE COLLABORATION AND ALIGNMENT BETWEEN SERVICE FUNCTIONS THAT IMPROVE:

- INTERNAL COMMUNICATIONS
- FUNCTIONAL LINKS (Required Horizontal Alignment to Undertake Work including with 3rd Party local services)
- INTERNAL ORGANIZATIONAL COLLABORATION /EDUCATION (Supports Way of Work, Exposure, Opportunity, Corporate Learning, Level of Support, Availability of Technology)
- ACCESS TO RECORDS and OTHER SUPPORT MATERIAL
- INTEGRATION/ALIGNMENT WITH 3RD PARTY SERVICES

TRAVEL TIME: (HOURS/YEAR)

- COUNCIL MEETINGS
- INTER-DIVISIONAL MEETINGS
- TRAINING
- SUPPORT CALLS AND BACK-UP

ADEQUATE MEETING SPACE: (Size, Frequency of Use, Amenities, Privacy)

SPACE EFFICIENCY: (Current Needs, Future Growth)

FLEXIBILITY / ADAPTABILITY TO ORGANIZATIONAL CHANGE

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EVALUATION METRICS FOR OPTIONS

CUSTOMER SERVICE: (Positive, Neutral, Negative)

ACCESS FOR RESIDENT CLIENT SERVICES:

- Services that are frequently accessed by members of the general public or which occur multiple times per year. Visits to access this group of services are typically unplanned and require quick and easy access.

ACCESS FOR ONE-TIME / BUSINESS SERVICES:

- Services that are accessed by members of the business community and / or the general public that require interactions with multiple departments. Would also include services that are accessed infrequently by the general public.

ACCESS TO 3RD PARTY SERVICES: (Health, Social Services, OPP, POA Court/Services)

SERVICES ORGANIZED AROUND COMMON CLIENTELE

CLARITY OF SERVICE PROVISION FOR CLIENTS: (Is it intuitive for clients where to find services)

AVAILABILITY OF PRIVATE SPACE

AODA COMPLIANT

AVAILABILITY OF COMMUNITY BASED SPACE: (Options for touchdown space, constituent matters)

ADEQUATE PARKING FOR CLIENTS

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EVALUATION METRICS FOR OPTIONS

CORPORATE IMAGE: (Positive, Neutral, Negative)

PROVIDES A COMMUNITY PRESENCE FOR MUNICIPAL GOVERNMENT

SUPPORTS THE ESTABLISHMENT OF THE COUNTY MUNICIPAL BRAND

THE ECONOMIC IMPACT OF THE OPTION: (investment, spending multiplier)

PROVIDES A POSITIVE IMAGE FOR THE COUNTY GOVERNMENT: (building quality, reputation)

PROVIDES A WELCOMING CLIMATE FOR CLIENTS / RESIDENTS

ENHANCES THE PUBLIC'S UNDERSTANDING OF THE ROLE AND FUNCTIONS OF LOCAL GOVERNMENT

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EVALUATION METRICS FOR OPTIONS

WORK ENVIRONMENT: (Positive, Neutral, Negative)

ADEQUACY OF SPACE FOR STAFF: (size, meeting space, natural light, temperature)

EQUITY OF SPACE ALLOCATION AMONGST STAFF

SECURITY REQUIREMENTS: (safety, money, technology)

ENERGY CONSUMPTION

FUNCTIONALITY FOR COUNCIL MEETINGS/COURTS/TRIBUNALS

CONFLICTING SERVICE FUNCTIONS: (noise, scheduling, clients)

TECHNOLOGY IMPLICATIONS: (e-meetings/broadcasts, IS support, more effective IT infrastructure)

HEALTH AND SAFETY MATTERS

AMENITIES THAT SUPPORT STAFF MORALE: (lunch space, parking, outdoor spaces)



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ACCOMMODATION OPTIONS TO BE EVALUATED:

Modified Status Quo	Partial Consolidation	Full Consolidation
<p>General Description: Retain a decentralized service delivery model that maintains administrative offices and/or staffed customer service centres in the major communities. Undertake minor building rationalization improvements and implement customer service technology enhancements over time to enhance self-service opportunities.</p> <p>Two Options:</p> <ol style="list-style-type: none"> 1. Maintain Current County Administrative Building in Caledonia (Lease or New Build); Consolidate DMPB & DSO 2. Maintain a Customer Service Centre at HCCC; Consolidate DMPB & DSO 	<p>General Description: Eliminate Satellite Administrative Offices, retain the CAB and build additional space in Cayuga to consolidate administrative functions in one community. The additional space could either be on existing County land or purchased property. Consider adjacency improvements when deciding what functions go where. Implement technology enhancements to provide local self-service opportunities.</p>	<p>General Description: Consolidate and co-locate administrative functions in a new purpose built administrative centre. Implement technology enhancements to provide local self-service opportunities.</p>
<p>Details:</p> <p>Option 1A</p> <ul style="list-style-type: none"> • Retain current administrative functions at the HSO, CSO, CAB, Kohler and HCCC buildings. Caledonia lease will need extension or an alternate facility in that community will need to be found • Consolidate the services at DSO and DMPB into a single building; sell/lease surplus building • Retain current Health and Social Services functions at DMPB & CSO (no space expansion) • Retain record retention and IT Training Lab in DMPB • Retain OPP offices at current locations <p>Option 1B</p> <ul style="list-style-type: none"> • Cancel CSO lease 	<p>Details:</p> <ul style="list-style-type: none"> • Close Satellite Offices (DSO, HSO, CSO); sell/lease surplus buildings and cancel CSO lease • Move administrative functions from Kohler and HCCC to Cayuga • Address accommodation of Health staff currently in Caledonia and Social Services staff currently at DMPB • Retain DMPB (Environmental Services - Dunnville, OPP, IT Training Lab, Records Retention, Possible Lease space, Social Services including possible expansion) • Repair CAB HVAC system and other renovations as required • Construct new administrative space in Cayuga to consolidate staff not housed in CAB and to co-locate staff to increase adjacencies 	<p>Details:</p> <ul style="list-style-type: none"> • Close Satellite Offices (DSO, HSO, CSO); close CAB; sell/lease surplus buildings and cancel CSO lease; • Move administrative functions from Kohler and HCCC to new administrative centre • Address accommodation of Health staff currently in Caledonia and Social Services staff currently at DMPB • Retain DMPB (Environmental Services – Dunnville, Social Services including possible expansion, Records Retention, Possible Lease Space, OPP) • Construct new central administrative centre to include , IT Training lab, POA court facilities, new Council Chambers • Find/retain location for Caledonia OPP office and find/retain location in Hagersville • Address Needs of Hagersville Market washrooms

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<ul style="list-style-type: none"> • Consolidate the services at DSO and DMPB into a single building; sell/lease surplus building • Relocate FaPO to HSO and retain Customer Service Representatives • Take advantage of adjacencies and co-locate the Divisions from CSO with Planning Services (from HSO) through new build • Use HCCC space for a Customer Service Centre (CSR's, Building Inspectors) • Relocate Health Unit Staff <p>Alternative to Option 1B</p> <ul style="list-style-type: none"> • Also add KSO staff (Public Works Administration) to new build to address adjacencies 	<ul style="list-style-type: none"> • Evaluate location options (Arena, Court House square, OPP Headquarters, private lands or combination) for new build in Cayuga • Find/retain location for Caledonia OPP office and find/retain location in Hagersville • Address Needs of Hagersville Market washrooms • Provide on-line service terminals at County Libraries – expanded client self service 	<ul style="list-style-type: none"> • Provide on-line service terminals at County Libraries – expanded client self service <p>Alternative to Option 3 Relocate Records Retention area to new central facility</p>
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Key Milestone	Specific Actions	Timeline	Responsibility	Expected Outcome
Pre-Project Planning	<ul style="list-style-type: none"> Secure commitment of Staff resources 	June	CAO	Secondment of staff / prioritization of work
	<ul style="list-style-type: none"> Develop Preliminary Project Charter 	June	CM	Identification of project scope, timeline, options, criteria for review with Project Team
Project Kick Off Meeting	<ul style="list-style-type: none"> Project Team working meeting 	Early July	CM	<ol style="list-style-type: none"> Input into and confirmation of Project Charter, Roles, Milestones and Timing Identification of Accommodation Options
Communication to Staff	<ul style="list-style-type: none"> Introduction of Initiative to Staff to proactively manage messaging to internal staff 	Mid-July	CAO	<ol style="list-style-type: none"> As Staff will be asked to provide information during the research phase the communication piece will be to ensure awareness of the initiative and to manage concerns Seek input from all Staff in terms of issues, implications
Council Approval of Project Scope	<ul style="list-style-type: none"> Report/Workshop with Council 	End of August	CM	Approval of Project Charter, Workshop to identify Key Options, Decision Principles, Evaluation Criteria and the Centralization Option Community location
Communication to Community	<ul style="list-style-type: none"> Press Release to Community to inform them of the Initiative, Scope and Timing following Council Workshop 	End of August	Jill Shea/CAO	Press Release

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Background Research	Specific Actions	Timeline	Responsibility	Expected Outcome
Customer Use of Satellite Offices	<ul style="list-style-type: none"> • Compile information from CSR's and Staff regarding: <ul style="list-style-type: none"> ○ # users ○ Nature of clients ○ Nature of transactions and frequency • Identify transactions benefitting from a local presence vs. infrequent activities 	June to Oct	Cathy Case	Factual information to feed into analysis
Implications of Merging DSO with DMPB	<ul style="list-style-type: none"> • For each Option evaluate the adequacy of space at DMPB • Determine cost of any required improvements for each Option 	July	Hugh Hanly/Phil Mete	Confirmation of adequacy of modified status quo option
Identify Key Space Requirements Associated with Options	<ul style="list-style-type: none"> • Review Mayhew work, current staff complement, including part time and students and projected growth and space needs to update to 2015 • Meet with POA, Health & Social Services GM and OPP to determine space needs • Identify space needs for each Option • Evaluate 'capacity for additional buildings at Cayuga Arena and Court House Square' • Provide high level capital costing of required space. 	June to Sept July/August June to Sept July	Hugh Hanly & Financial Analyst Karen General Hugh Hanly Phil Mete/Hugh Hanly	Factual information Consider existing inefficient space vs required efficient space

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	<ul style="list-style-type: none"> parking, furnishings – new build and renovations • Provide estimate of operating costs for consolidated building options • Identification of short to mid term use of Provincial Registry Building and Court House 		<p>Phil Mete/Hugh Hanly</p> <p>Phil Mete/Hugh Hanly</p> <p>Cathy Case</p>	<p>To compare to existing costs – any efficiencies to be gained</p> <p>To evaluate whether these facilities would become available</p>
Capital and Annual Operating Expenses for Existing Offices	<ul style="list-style-type: none"> • Undertake BCA for existing Offices • Based on BCA, Capital Budgets identify scope of investment required for status quo • Undertake an analysis of operational costs 	June to Sept	<p>Phil Mete</p> <p>Hugh Hanly & Phil Mete</p> <p>Financial Analyst</p>	Factual information
Mileage Cost Analysis	<ul style="list-style-type: none"> • Analyze a sample of staff expense claims to extrapolate costs and time spent on interoffice travel 		Cathy Case/ Financial Analyst	
Adjacencies and Cross-Functional Improvements	<ul style="list-style-type: none"> • Interview Managers to identify number of cross Divisional meetings undertaken as well as service delivery issues and opportunities associated with options • Identify number of meetings/hours Managers 		Cathy Case	<p>Information to support proposition that shared work location achieves co-location efficiencies (i.e hours spent, frequency)</p> <p>The proposition that more efficient time spent working from one's office vs. another location</p>

Administrative Buildings Accommodation Review

August, 2015

	<p>are 'on call' for Council, Budget etc.</p> <ul style="list-style-type: none"> Review/Update Mayhew adjacency analysis based on interviews 3rd Party Co-adjacency opportunities/benefits due to proximity to County services 			
<p>Obtain Opinion of Value for HSO, DSO & CAB</p> <p>Obtain Potential Lease Value/Marketability for HCCC space</p>	<ul style="list-style-type: none"> Retain real estate individual to provide estimate of value 	June to Aug	Cathy Case	Potential Revenue generation estimate
<p>CSO Lease</p>	<ul style="list-style-type: none"> Provide current annual lease cost Provide estimate of short term lease extension costs 	June	Hugh Hanly	<p>Base information</p> <p>To provide an estimate of transition costs that will be incurred as part of any consolidation option</p>
<p>Customer Service Best Practices</p>	<ul style="list-style-type: none"> Evaluate Mayhew Report relative to adjacencies for enhanced customer service Undertake a review of municipal approaches to achieve great customer service, improve community image including transactual technology Work with IT to define costs/implications to implement customer service technology solutions 		Cathy Case	<p>Identification of a broad plan to make customer service a key focus and then to apply it to the options to see whether one is better or not and what types of investments may need to be made with each option</p>

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	<ul style="list-style-type: none"> Identify and evaluate opportunities to apply to alternative options 			
Staff Impacts	<ul style="list-style-type: none"> Undertake a survey of satellite office staff to try to estimate the impact of staff on local businesses Review how many staff in the satellite offices reside in the community who would change work locations Research number of staff moves undertaken between various facilities over past 5 years and cost 		Cathy Case	Estimation of business impacts of consolidation option
Undertake Financial Analysis of Accommodation Options	<ul style="list-style-type: none"> Develop Financial Model to evaluate options including inputs required Calculate Insurance Implications of Options Identify and Calculate Transition Costs Populate model and refine outputs 	<p>July</p> <p>July – Sept</p> <p>Aug</p> <p>Sept /Oct</p>	<p>Mark Merritt Cathy Case</p> <p>Financial Analyst/HR</p> <p>Finance staff/Karen General</p>	
Interview Affected Ward Councillors and Council as a Whole	<ul style="list-style-type: none"> One on one interviews with each Councillor to identify issues, concerns or needs 	July/Aug	CAO	Early identification of key political needs
Stakeholder Interviews	<ul style="list-style-type: none"> Meet with Chamber/BIA to review project scope, criteria and to get initial input One on one discussions with key community leaders 	Sept	<p>CM</p> <p>CAO</p>	To get early input from targeted stakeholders to identify issues that will need to be addressed during the evaluation process

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Council Report/ Workshop on Research Results with Staff Recommendation	<ul style="list-style-type: none"> • What we heard and what we found presentation in a scorecard format • Are we missing anything? 	Nov	CM	To provide the results of the analysis and input . Intent is for Council to receive information at this stage
Comment Period	<ul style="list-style-type: none"> • Opportunity for stakeholders to provide comments on the analysis findings • Review findings with community leaders 	Dec		To allow public at large to comment based on the facts provided
Council Decision	<ul style="list-style-type: none"> • To include any public input received 	2016	CM/CAO	

Adopted Way of Work Standards – Report CAO-01-2009

We have instituted *Way of Work* standards approved by Council in 2009 which are guidelines for how the Corporation is to conduct its business functions and especially, how staff will conduct the business of the County. Our Way of Work is based upon:

- **Customer Service** – Making the relationship with our citizens our priority and emphasis.
- **Proactive Communication** – Anticipating the needs of our customers and providing timely and accurate information.
- **Trust, Respect, Integrity and Humanity** – Treating people fairly and equally and celebrating achievement.
- **Teamwork / Collaboration Across Service Areas** – Internal interactions that are oriented toward common goals, shared interests and helping each other.
- **Community Engagement / Partnerships** – Engaging staff and stakeholders with real opportunities to be involved in shaping the decisions that affect them.