

District of Summerland Organizational Review:

Key Findings and Recommendations



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1. Background and Purpose

Background

The District of Summerland is currently facing many of the same social and political challenges of smaller communities in British Columbia and across Canada. Situated in the beautiful Okanagan, Summerland is a district municipality which focuses on its residents and their needs.

However, there are many changes and challenges occurring throughout Summerland. These include:

Economic Challenges - The District of Summerland does not have a substantial industrial or commercial economy, largely due to its proximity the larger metropolitan centre of Penticton. The community has struggled to provide jobs for younger working families, and has seen a significant demographic shift.

Shifting Needs of the Community - Summerland has experienced a shifting pattern of community support for expansion and growth of the community and its economy. As these desires manifest in new councils, so too have management expectations been modified to support new priorities and mandates.

Community Relations – Summerland is a vibrant and concerned municipality. As such, Council wants to encourage and promote transparent government and continuous improvement of professional operations. Additionally, as with many other municipalities, there is a constant struggle to ensure publically provided services are meeting the needs of citizens, and doing so within budget.

In light of many of these challenges, and recognizing that municipal administration had not been professionally analyzed or significantly altered in multiple decades, the District of Summerland initiated an Organizational Review in the second quarter of 2011.

Purpose and Approach

The primary objectives of the review were to identify appropriate service levels for District services and to review the organizational structure and workforce.

Specific Objectives:

- Create an inventory of programs and services offered by departments
- Identify core and discretionary services
- Determine if discretionary programs can be altered to become more cost-efficient
- Identify service improvement opportunities, including shared services
- Identify opportunities to become more accountable to citizens
- Link corporate strategic priorities and position the organization for the future
- Examine at a macro level the City's labour costs and staffing levels
- Recommendations or options for changes to organization structure and reporting relationships

In order to answer these questions and complete the review Helios consultants utilized their proprietary organizational review approach which includes:

- **A collaborative process** – involving council, management, staff, and the community
- **Fact-based, data-driven analysis** – all analysis and recommendations were based upon a factual, analytical assessment
- **Public interest** – assessments and recommendations focused on the public interest
- **Best Practices** – where appropriate, best practices were incorporated in recommendations
- **Comparatives** – where possible, assessments sought to compare City operations with appropriate benchmark organizations

Using this approach Helios Consultants performed:

- **Internal Analysis:**
 - A review of available information and attribution of costs to organizational areas and services
 - Included a review of the 5 year financial plan, the 2010 budget, 2011 Year to date, and 2010 plan
 - Internal review of operational structure, staffing levels, supervision, volumes and nature of specific work activities, department interaction to achieve goals and deliver services.
- **Internal Interviews:**
 - Interviews and focus groups with all management and staff from across the organization to assess current state performance and areas for improvement
- **City Comparison:**
 - A comparison of the District of Summerland to 7 other similar BC municipalities
 - The comparison targeted: financials, organization, compensation, facilities and services
- **External Interviews:**
 - A series of one-on-one interviews with external partners, including chamber of commerce, labour unions, and local community representatives.

Based on the consultation, interviews and analysis performed, Helios Group has developed eight key findings with specific recommendations for improvement, as well as further departmental level recommendations which will be outlined and explained in the remainder of this document.

2. Key Findings

Through our analysis of the District of Summerland we uncovered eight key findings that we feel are critical for consideration. These key findings are:

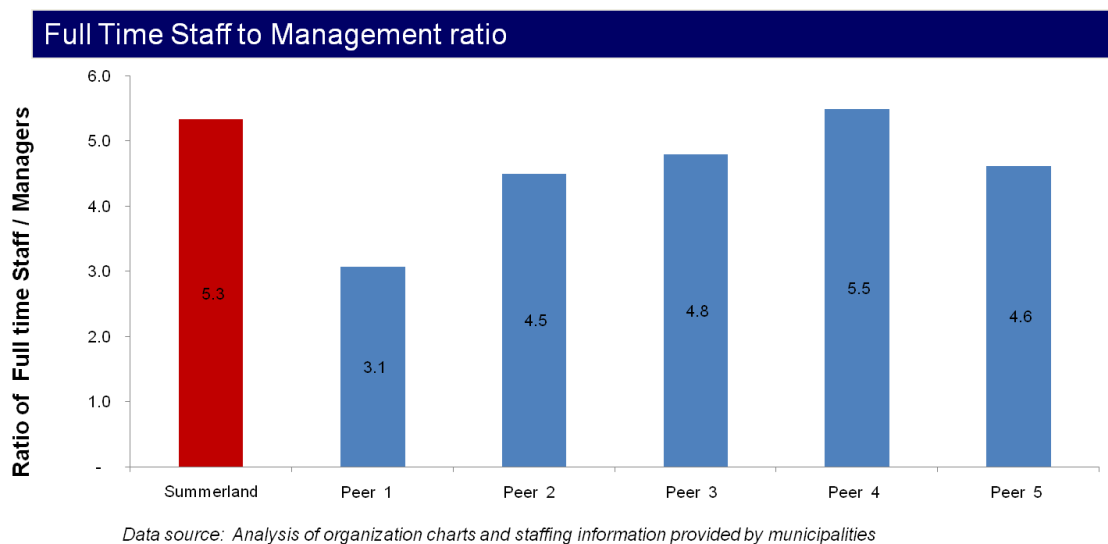
No.	Findings	Issues
1	Resource levels are appropriate	<ul style="list-style-type: none"> • There may be small opportunities for efficiency gains in specific departments, but overall resource levels are appropriate. • No major structural or efficiency problems were identified, and no significant restructuring is recommended.
2	Compensation levels are appropriate	<ul style="list-style-type: none"> • A comparison of management salaries to peer communities shows that Summerland compensation is well within the average compensation level for city managers.
3	Need to focus on adherence to long-term plans	<ul style="list-style-type: none"> • Additional strategic and long-term planning could improve the ability to conduct prioritization with respect to efforts and resources. • Plans are often created, then adjusted due to emerging issues.
4	Financially extended	<ul style="list-style-type: none"> • The district cannot currently afford to maintain all working infrastructure at peak levels. • Prioritizations have to be made annually, and debt levels have risen. • Operating ratio remains in a surplus level, meaning that reserves can be replenished through diminished capital spending. • Lack of alternative funding strategies means that many potential projects or infrastructure investments cannot be begin due to lack of tax funding.
5	External perception of major improvements in past 2 years	<ul style="list-style-type: none"> • Perceived as management-driven improvement in customer service and relationship management. • Identified that the organization still can improve, but gains are encouraging.
6	Management of communication and culture	<ul style="list-style-type: none"> • Communication within the organization, cooperation between departments, and coordination of projects can all be improved.
7	Standardization of business processes	<ul style="list-style-type: none"> • Key supporting business processes including those in HR and procurement should be standardized, adopt best practices, and documented.
8	Economic development	<ul style="list-style-type: none"> • No current economic development role or functional responsibility within the organization

3. Corporate Recommendations related to key findings

3.1 Resource levels are appropriate

The primary purpose of the Organizational Review was to determine the overall efficiency and effectiveness level of the Municipality. Although a number of minor changes to resourcing and structure are suggested in the various departmental assessments, overall the organization was found to be operating in a very efficient manner.

In addition, we looked at the ratio of full-time staff to management ratio for Summerland and each of our comparator benchmark communities. Summerland had one of the highest ratios of staff to management, indicating that the organization has done a comparatively good job of ensuring an efficient level of management within the organization.



- Summerland's staffing to Management ratio is one of the highest among peer municipalities.

Issues identified:

- There may be small opportunities for efficiency gains in specific departments, but overall resource levels are appropriate.
- No major structural or efficiency problems were identified, and no significant restructuring is recommended.

Recommendations:

- Next logical step following the organizational review would be a detailed department-by-department process review, including process mapping, analysis and optimization.

3.2 Compensation levels are appropriate

A review and comparison of management compensation levels showed that Summerland compensation levels are well within the average level of peer communities.

While no changes to compensation are put forward, it is recommended that regular reviews of compensation continue to be conducted, including benchmarking levels for all staff.

3.3 Need to focus on adherence to long-term plans

In the face of ever-changing community and council needs, managing a long-term plan for a municipality can be very challenging. In Summerland's case, it is noted that although we have set-out a number of strategic and long-term plans, and management and staff can and do accomplish many of their objectives on an annual basis, this process is not well defined or documented.

Issues identified:

- Additional strategic and long-term planning could improve the ability to conduct prioritization with respect to efforts and resources.
- Plans are often created, then adjusted due to emerging issues.

Recommendations:

- Focus on reporting, tracking and transparency.
- A formal strategic planning process involving Council and Management should be conducted on an annual basis. This process should result in corporate goals as well as supporting objectives for each department and each manager.
- Progress reporting against these objectives and goals should be conducted on a quarterly basis with management and council.
- Any changes introduced to the strategic plan (either by Council or by Management) should be documented and discussed. Trickle-down effects on departmental and management objectives should be documented and updated.

3.4 Financially extended

As with many smaller communities in British Columbia, Summerland is experiencing financial difficulties with ever-increasing costs, and a desire to maintain its existing taxation policies.

Issues identified:

- The district cannot currently afford to maintain all working infrastructure at peak levels.
- Prioritizations have to be made annually, and debt levels have risen.
- Operating ratio remains in a surplus level, meaning that reserves can be replenished through diminished capital spending.
Lack of alternative funding strategies means that many potential projects or infrastructure investments cannot be begin due to lack of tax funding.

Recommendations:

- Focus on short-term replenishment of reserves through diminished capital spending for 1-2 years (maintenance capital projects should be maintained, while expansionary projects are deferred).
- Focus on development of alternative funding strategies for both capital and operational projects. Numerous sample alternative funding strategies have been shared with Council and Management. A thorough review by management and Finance will be necessary to determine applicability of each strategy within Summerland.

3.5 External perception of major improvement in the past two years

Interviews and discussions with external community members have resulted in a positive review of municipal operations, particularly over the past two years.

Issues identified:

- Perceived as management-driven improvement in customer service and relationship management.
- Identified that the organization still can improve, but gains are encouraging.

Recommendations:

- Continue to cultivate relationships with the community and build upon successes.

3.6 Management of communication and culture

Managing people is a key component of successfully managing a municipal organization. The organization is staffed by numerous competent, capable and professional staff. Improving the internal management of the organization should focus on improving communication and management of internal culture.

Issues identified:

- Communication within the organization, cooperation between departments, and coordination of projects can all be improved.

Recommendations:

- Communication between management and staff within Municipal Hall should be improved. Numerous communications strategies are possible:
 - Introduce two-way communication meetings – e.g. Departmental meetings in advance of office-wide meeting in order to discuss results of council, and provide an opportunity for questions and answers.
 - Routine leadership updates (e.g. Emails from CAO)
 - Communicate the vision, long-term plan, and staff's place within that plan.
 - Management at all levels in Municipal Hall could engage staff more directly, seeking one-on-one discussions, updates and questions.
 - Regular internal publishing of questions and answers following departmental or office meetings.
- Ownership of internal communications responsibilities should be clearly defined.
- Technical Planning meetings should be reinstated between Development Services and Engineering & Public Works to improve communication between departments. Other departments should be included as necessary; however, the focus should remain on improving communications between Development and Engineering.

3.7 Standardization of business processes

As organizations grow, it is crucial that best practices be adopted, particularly in supporting business areas. A number of non-standardized processes were identified through internal discussion and assessment.

Issues identified:

- Key supporting business processes including those in HR and procurement should be standardized, adopt best practices, and documented.

Recommendations:

- Numerous business processes should be standardized and brought up to best practice levels.

Procurement

- Procurement is currently highly decentralized, without strict policies on vendor management, purchase orders, or inventory control.
- Although resourcing for some purchasing decision-making can remain decentralized, each of these policies should be standardized, documented, and overseen by the Finance department through regular reporting and/or auditing.
- Continue experimental process of bid decomposition for large-scale capital projects to encourage a wider variety of bids.

HR (these recommendations require a dedicated or contract HR specialist)

- Hiring process should be well defined, and all stages of interviewing and evaluation should be documented.
- Standardized process for management performance reviews and career coaching should be defined, documented and adhered to universally by all managers
- A performance review and career coaching process should be introduced for unionized staff, provided this can be agreed upon with the unions.
- Attendance policies and working hours for both staff and management should be clearly defined . Protocols for out-of-office time and accessibility by telephone or email should be reviewed.

3.8 Economic development

The municipality is currently without an Economic Development Officer, and has not assigned responsibility for economic development to any other department. Council and management have been unsure regarding the potential value-add of economic development activity within the municipality.

Issues identified:

- No current economic development role or functional responsibility within the organization.

Recommendations:

- Although Economic Development is an important function within the municipality, the District does not currently have adequate demand for these services to dedicate a full-time resource. The most critical ED activities are liaising with potential investors, less crucial activities include proactive research and outreach.

- Potential solutions include:
 1. Part-time economic development – ideal solution if a suitable candidate can be found.
 2. Sharing economic development functions with another management position – unfortunately, none of the existing management have the skillset or desire to take on economic development.
 3. Shared service with another community – NOT recommended due to inherent conflicts of interest in acting as an agent for more than one community.
 4. Contract services – NOT recommended due to lack of internal control over activities and focus.

4. Service Improvement Opportunities

We have identified a number of department-specific initiatives for service improvement for the District of Summerland. In this section we will provide a brief overview of each department assessed, and explore each of these opportunities.

4.1 Finance and Corporate Services

Overview:

The Finance Department provides financial oversight of the organization. Long-term financial strategy is managed through capital and operating plans, while an annual budget process is used to manage short-term financial requirements. The department is broadly responsible for financial planning and reporting, accounting and revenue collection. This department also provides both strategic and tactical management of Information Technology (IT) and Human Resources (HR).

Mandate:

The finance department's responsibilities and authorities come from legislation mandated by the Community Charter, provincial and federal Statutes and Municipal Bylaws.

Service Categorization:

Service	Description	Resourcing	Assessment
Strategic Financial	Long-term and short-term planning and financial control of the corporation. <ul style="list-style-type: none"> • Budgeting • Long-range planning • Project control 	Full-time responsibility of the Director of Finance	<ul style="list-style-type: none"> • Legal requirement • Core service
Tactical Financial	Day-to-day financial management and accounting. <ul style="list-style-type: none"> • Taxes & Billing • Accounts payable • Accounts receivable • General Ledger • Payroll & Benefits • Reception • Cashier • Maintaining land records 	Oversight of day-to-day accounting by Manager of Corporate Services. Daily activity – full-time responsibility of 4 key staff plus part-time responsibility of inter-departmental secretary. Note: 2 imminent retirements. Training is currently underway to manage succession.	<ul style="list-style-type: none"> • Legal requirement • Core service

Information Technology	Management of IT needs of the organization <ul style="list-style-type: none"> • Planning, architecture and applications • Website • User support • Projects 	Part-time responsibility of Manager of Corporate Services. Full-time responsibility of (new) IS Coordinator Contract support for complex IT management	<ul style="list-style-type: none"> • Core supporting service
Human Resources	Management of HR needs of the organization <ul style="list-style-type: none"> • HR policies and planning • Recruitment and selection • Labour relations • Personnel issues 	Part-time responsibility of Manager of Corporate Services.	<ul style="list-style-type: none"> • Core supporting service

Recommendations:

No.	Description	Rationale and impact
A.1	Re-scope Manager of Corporate Services role to remove HR from portfolio <ul style="list-style-type: none"> • Current Manager of Corporate Services role is broad in scope, resulting in identified challenges in both Human Resources and Information Technology. • A variety of options have been presented to transition HR away from the Finance portfolio. Recommendation is to move to professional contracted services for at least one year to focus on developing strategic HR capabilities, and to consider hiring a professional HR resource in the Administration department as a replacement for the Deputy Corporate Officer upon succession to the Corporate Officer position. 	Strategic need for improved HR management ~\$50-100K cost for contract support
A.2	Catalogue and prioritize IT spending <ul style="list-style-type: none"> • Identify all potential hardware and software needs throughout the organization and develop a prioritized investment list to assist department heads in planning for internal process improvement. 	Introduction of best practices
A.3	Conduct detailed finance process review <ul style="list-style-type: none"> • Perform detailed process analysis and optimization, with specific focus on: <ol style="list-style-type: none"> 1. Consolidation of the property tax process to a single role 2. Identification of manual forms for automation 	Future operational savings ~\$10K cost with consulting support
A.4	Define and document clear procurement processes and centralize oversight <ul style="list-style-type: none"> • Develop clear policies for (i) vendor management; (ii) purchase orders and work orders; and (iii) inventory control. • Identify and document decentralized decision-makers. • Define oversight processes for reporting and audit. 	Introduction of best practices
A.5	Define and document project management process <ul style="list-style-type: none"> • Develop a clear process for managing large-scale projects to ensure appropriate planning occurs, departments are involved and informed appropriately, and reporting to management and council is controlled. 	Introduction of best practices

4.2 Development Services

Overview:

Development Services is responsible for the municipal services which relate to the planning and growth of the community. The department helps formulate policies to establish the longer term development of the community, and is responsible for current and long term development projects.

Mandate:

Development Services' responsibilities and authorities come from legislation mandated by the Community Charter, provincial and federal Statutes and Municipal Bylaws.

Service Categorization:

Service	Description	Resourcing	Assessment
Short-term development	Managing short-term development applications and inquiries. <ul style="list-style-type: none"> • Development permits • Council applications • Variance permits • Rezoning 	Full-time responsibility of the Manager of Development Services	<ul style="list-style-type: none"> • Legal requirement • Core service
Building permits and inspections	Managing building process <ul style="list-style-type: none"> • Building permits • Building inspection 	Full-time responsibility of Senior Building Inspector. Part-time responsibility of Secretary.	<ul style="list-style-type: none"> • Legal requirement • Core service
Property Inquiries	Counter inquiries related to property status.	Part-time responsibility of Secretary.	<ul style="list-style-type: none"> • Discretionary service
Municipal capital projects	Development and planning for large-scale municipal projects, e.g. RCMP building.	Part-time responsibility of Manager of Development Services.	<ul style="list-style-type: none"> • Discretionary service
Long-term planning	Development of long-term plans to guide community development. <ul style="list-style-type: none"> • OCP • CAP • Development guidelines • Land-use bylaws 	Full-time responsibility of Planner.	<ul style="list-style-type: none"> • Core service

Recommendations:

No.	Description	Rationale and impact
B.1	<p>No staffing or management changes currently recommended within Development Services</p> <ul style="list-style-type: none"> • Identified gap between development services revenue and expenses should be monitored for an additional year. Assuming volume of applications and revenues continue to increase with the improving economy, no changes are necessary. 	Appropriate Resourcing

B.2	<p>Reinstate multi-department planning committee meetings</p> <ul style="list-style-type: none"> To ensure Development Services remains well informed on topics of capital projects, engineering projects, and public works, previous technical planning committee meetings should be reinstated. 	Improve inter-departmental communication
B.3	<p>Ensure ongoing customer service focus</p> <ul style="list-style-type: none"> Incorporate customer service mindset and focus into departmental goals (as part of the strategic planning process), and ensure it is a component of performance management for all staff within Development Services, and measure results with the public. 	Service Level Improvement

4.3 Legal and Administration

Overview:

The Legal and Administration Department manages the relationship between Council and the Corporation, and holds responsibility for management of policy and regulation.

Mandate:

Legal and Administration responsibilities and authorities come from legislation mandated by the Community Charter, provincial and federal Statutes and Municipal Bylaws.

Service Categorization:

Service	Description	Resourcing	Assessment
Council Support	Supporting cyclical activities of Council <ul style="list-style-type: none"> Agendas & minutes Committee support Correspondence Legal documents & notifications Webcasting 	Shared responsibility of Corporate Officer and Deputy.	<ul style="list-style-type: none"> Legal requirement Core service
Policies and by-laws	Development and management of policy and by-law information	Shared responsibility of Corporate Officer and Deputy.	<ul style="list-style-type: none"> Legal requirement Core service
Records Management	Corporate filing and records management including legal documentation.	Part-time responsibility of Deputy.	<ul style="list-style-type: none"> Core service Discretionary scope
Leases and Agreements	Review and signing of legal contracts	Part-time responsibility of Corporate Officer.	<ul style="list-style-type: none"> Core service
Communications	Scheduled and ad-hoc communications with citizens <ul style="list-style-type: none"> Newsletter Citizens Survey 	Part-time responsibility of Corporate Officer.	<ul style="list-style-type: none"> Discretionary service
FOI Requests	Reviewing and responding to FOI requests	Part-time responsibility of Deputy.	<ul style="list-style-type: none"> Core service

Business Licenses	Issuing business licenses and permits	Part-time responsibility of Receptionist.	• Core service
By-law Enforcement	Investigating complaints and enforcing by-laws	Full-time responsibility of by-law enforcement officer	• Core service • Legal requirement
Reception	Management of incoming enquiries	Full-time responsibility of Receptionist.	• Discretionary service

Recommendations:

No.	Description	Rationale and impact
C.1	<p>Ensure adequate on-the-job training for Deputy Corporate Officer</p> <ul style="list-style-type: none"> Deputy Corporate Officer is seen as the successor to retiring Corporate Officer, this role should be monitored closely to ensure adequate on-the-job training, particularly over the following areas: (i) legal contract review; and (ii) provision of legal/policy advice to Council. 	Appropriate Resourcing
C.2	<p>Expand scope of resourcing skillsets within Administration</p> <ul style="list-style-type: none"> Once Deputy Corporate Officer succeeds Corporate Officer, seek to fill Deputy role with a resource professionally skilled in Human Resources or Local Government Policy. 	Appropriate Resourcing
C.3	<p>Introduce standardized Performance Management techniques and tools</p> <ul style="list-style-type: none"> A formal program for performance management of all staff and managers should be instituted, including objective setting, alignment with strategic plans, performance tracking, career progression conversations, professional development, etc. 	Introduction of best practices ~\$50K for pre-developed program and basic consulting support
C.4	<p>Institute consolidated Council reporting</p> <ul style="list-style-type: none"> Develop a standardized dashboard of key performance metrics (e.g. Kaplan's Balanced Scorecard) for regular collection and reporting to Council. 	Introduction of Best Practices
C.5	<p>Introduce functional responsibility for External Communications</p> <ul style="list-style-type: none"> The External Newsletter is a key communications tool in engaging the Summerland Community. Upon retirement of the incumbent Corporate Officer, this function should be included in the portfolio of the new Corporate Officer. All external communications, including the newsletter, website content, citizen surveys, public relations, and public notices should be a consolidated function within the Administration department. Additional training may be required to plan for and manage a broader spectrum of external communications. 	Service Level Maintenance

4.4 Parks and Recreation

Overview:

The Parks and Recreation department is responsible for District leisure programs, recreation facilities and communal spaces. The department is responsible for planning and delivering recreational programming in the form of children's activities as well as adult activities and league sports.

Mandate:

The Parks and Recreation department's responsibilities and authorities are designated by the District, and are overseen by a Parks & Recreation Commission.

Service Categorization:

Service	Description	Resourcing	Assessment
Recreation Programming	Development and delivery of recreation programming activity <ul style="list-style-type: none"> • Pool • Library • Banquet Hall • Special Events 	Full-time responsibility of the Facilities and Program Manager	• Discretionary Service
Aquatic Facility	Maintenance and operation of aquatic facility <ul style="list-style-type: none"> • Facility maintenance • Lifeguarding • Instruction • Cashier 	Responsibility of 2 full-time Aquatic Facility staff and 8 part-time staff.	• Discretionary Service
Arena	Maintenance and operation of arena <ul style="list-style-type: none"> • Facility maintenance • Ice maintenance • Banquet hall 	Responsibility of 3 full-time staff.	• Discretionary Service
Community Parks	Maintenance and management of parks <ul style="list-style-type: none"> • Groundskeeping • Building maintenance • Garbage collection • Outdoor facilities • Trails 	Responsibility of 4 full-time staff plus seasonal summer students.	• Discretionary Service
Recreation Administration	Administering recreation department, facilities and programs <ul style="list-style-type: none"> • Reception • Registration • Scheduling • Record keeping 	Responsibility of 2 full-time staff.	• Discretionary Service

Recommendations:

No.	Description	Rationale and impact
D.1	<p>Monitor workload and resourcing of Parks team</p> <ul style="list-style-type: none"> Responsibility for District green spaces has increased with the addition of new boulevards in recent major road developments. Resourcing has been identified as adequate; however, service levels may see a slight drop from prior years, particularly during shoulder seasons. Consider expanding summer student contracts to include part-time shoulder season work is necessary. 	Appropriate Resourcing
D.2	<p>Conduct detailed Parks & Recreation office process review</p> <ul style="list-style-type: none"> Perform detailed process analysis and optimization, with specific focus on: <ul style="list-style-type: none"> Identification of manual forms for automation and online services – time-keeping, program scheduling, program registration, facility booking. Although savings are possible, upfront investment would be required to automate processes. 	Future operational savings (1 FTE)

4.5 Engineering and Public Works

Overview:

The Engineering and Public Works Department oversees all district municipal engineering and works activities. The department is responsible for maintenance, improvement and installation of District services and infrastructure. This includes water and wastewater treatment plants, and an electrical utility.

Mandate:

The Engineering and Public Works department’s responsibilities and authorities are designated by the District.

Service Categorization:

Service	Description	Resourcing	Assessment
Water	Maintenance and upkeep of the District water supply: <ul style="list-style-type: none"> Plant maintenance Distribution maintenance System management 	Full-time responsibility of the Manager of Water Operations and 6 FT staff	• Core Service
Wastewater	Maintenance and upkeep of the District sewer system: <ul style="list-style-type: none"> Plant maintenance Collection maintenance System management 	Full-time responsibility of 4 FT staff, overseen by Deputy Director.	• Core Service
Electrical Utility	Maintenance and operation of utility <ul style="list-style-type: none"> Maintenance New construction Metering Administration 	Full-time responsibility of 6 FT staff, overseen by Deputy Director	• Discretionary Ownership

Public Works	Maintenance and management of works <ul style="list-style-type: none"> • Road maintenance • Snow removal • Cemetery • Landfill • Ice control • Signage • Vehicle and equipment maintenance • Lights and banners 	Full-time responsibility of Superintendent of Public Works and 18 FT staff.	• Core Service
Administration	Admin services to support Eng & PW <ul style="list-style-type: none"> • Timekeeping • Dispatch • Reception • Record keeping • Budgeting • Purchasing 	Full-time responsibility of 3FT staff, overseen by Director.	• Discretionary Service
Engineering	Engineering services: <ul style="list-style-type: none"> • Capital projects • Development service checks • Design support • Inspections 	Responsibility of 2 FT Engineering Technicians and 1 PT Draftsperson, overseen by Deputy Director.	• Core Service

Recommendations:

No.	Description	Rationale and impact
E.1	<p>Maintain staff complement</p> <ul style="list-style-type: none"> • Engineering and Public Works staff complement appears higher than benchmark comparators; however, this difference is accounted for by three factors: <ol style="list-style-type: none"> 1. Summerland's operation of an Electrical Utility 2. Summerland's more expansive road network 3. Summerland's prior investment in a high-capacity water system which must be appropriately maintained 	Appropriate Resourcing
E.2	<p>Consider contract assistance or reallocation of efforts to clear engineering technician backlog, rather than filling vacant position</p> <ul style="list-style-type: none"> • Significant challenges have been identified in inputting backlogged updates to records and maps. This should be a priority area moving forward as it creates a compound challenge when records are not up-to-date. • Efforts can be redirected over the next year with a corresponding slowdown in capital projects, or contract resourcing could be brought on (subject to CBA requirements) to clear the backlog. 	Future operational savings (1 FTE)
E.3	<p>Provide administrative and clerical support to Summerland Power</p> <ul style="list-style-type: none"> • Foreman and Meter Technician at Summerland Power are both currently engaged in significant administrative and clerical activity. • Providing additional support from the existing Engineering and Public Works admin pool should help alleviate this burden, freeing up time to be spent in the field. • If Engineering and Public Works administrative staff are unable to absorb additional work, relief can be provided for telephone reception and record-keeping activity from Municipal Hall. 	Operational Savings and Improved Front-Line Service Focus

E.4	<p>Set objectives for Deputy Director to improve functional knowledge of Wastewater and Electrical</p> <ul style="list-style-type: none"> Deputy Director currently has responsibility for Wastewater and Electrical. Going forward, professional development should focus on the Electrical Utility, as proposed changes in metering are likely to result in a significant demand for customer service. 	Professional Development
E.5	<p>Gradual restructuring</p> <ul style="list-style-type: none"> Upon retirement of the existing Manager of Water Operations, Wastewater can be rescoped to be included in the Water management portfolio, leaving a more balanced scope of management responsibilities across Engineering and Public Works. 	Appropriate Management Scope
E.6	<p>Ensure continued decomposition of bids for large-scale capital projects</p> <ul style="list-style-type: none"> To improve efficiency, encourage a wider variety of bid responses, and improve relationships with service providers, Engineering should continue its practice of decomposing large-scale bids. 	Cost Efficiency