



# Nanaimo Core Services Review

## Phase II Work Plan

February 08, 2016



# Table of Contents

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<u>Title</u>	<u>Page #</u>
1.0 Introduction .....	1
2.0 Scope .....	1
Departmental Service Areas.....	1
Corporate-wide Processes .....	1
3.0 Responsibilities .....	2
4.0 Review Approach.....	2
4.1 Approach for reviewing Departmental Service Areas .....	2
4.2 Approach for reviewing Corporate-wide Processes .....	5
5.0 Timing .....	6



## 1.0 Introduction

WMC was contracted by the City of Nanaimo to conduct a Core Services Review to “focus on the particular context, challenges and opportunities facing the City of Nanaimo. The global review is an opportunity to compile a clear foundation of information about the current state of the City’s services and programs. It is expected the review will also generate options for consideration by Council of how challenges may be met and opportunities maximized.”

As outlined in the Project Charter approved by Council on 25<sup>th</sup> January 2016, the second phase of the project is the “Organization and Operational Assessment”. This document outlines the work plan for the Organizational and Operational Assessment phase.

## 2.0 Scope

The following **16 departmental service areas** and **6 corporate-wide processes** are in scope for the Core Services Review project.

### Departmental Service Areas

1. HR Recruitment/Retention/Succession Planning Training
2. HR/Compensation
3. Financial Policies (renamed from the original Treasury and Investments, to include other financial policy areas)
4. Transportation (Operations)
5. Sanitation
6. Fleet Services
7. Police Support
8. Bylaw/Parking
9. Facilities Planning and Operations
10. Recreation Administration, Operations and Environment
11. Permissive Tax Exemptions and Grants
12. Nanaimo Economic Development Corporation, including Tourism
13. Downtown Nanaimo Business Improvement Association\*
14. Building Permits and Inspections
15. Subdivision, Development, Land Use Planning and Approvals (expanded to include all planning and development functions, not subdivision approvals)
16. Vancouver Island Conference Centre

\*treated as a separate service area, as there does not appear to be any formal relationship with NEDC or funding from it.

### Corporate-wide Processes

1. Strategic planning, business planning and budgeting
2. Capital Projects Planning and Development
3. Asset Management
4. Project Management

5. Purchasing and Contract Administration
6. Performance Measurement

### 3.0 Responsibilities

Based on each team member’s expertise, the responsibilities for completing the reviews of the above mentioned departmental service areas, corporate-wide processes and advisory committees have been assigned as given below. Please note that even though the responsibilities have been assigned to individual team members, all team members will share knowledge and findings with each other to ensure that a holistic “system” perspective is maintained across multiple areas, throughout the project.

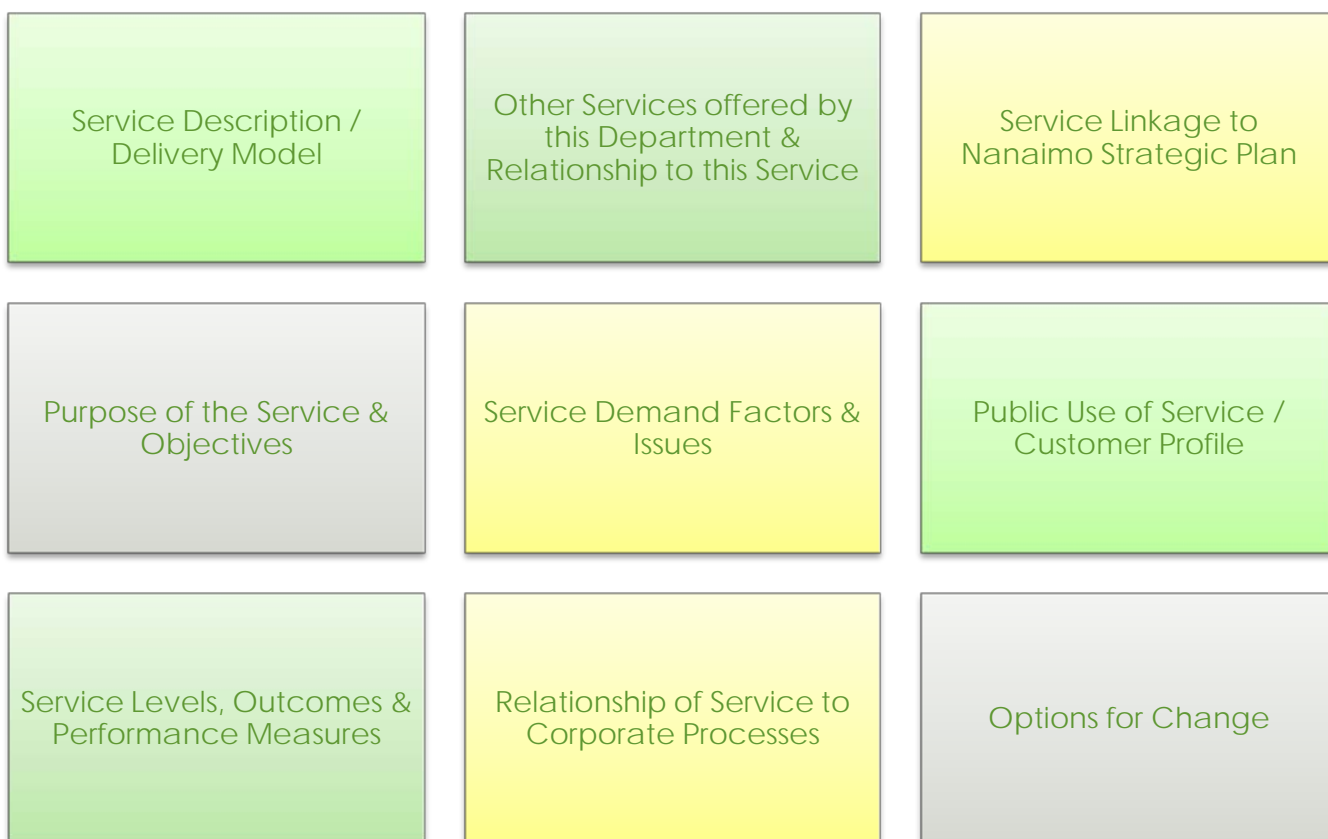
#	Departmental Service Area	Responsible Team Member(s)
1	HR Recruitment/Retention/Succession Planning Training	TCI
2	HR/Compensation	TCI
3	Financial Policies	Doug Zabkar
4	Transportation (Operations)	Jerry Davis
5	Sanitation	TCI
6	Fleet Services	Jerry Davis
7	Police Support	Jerry Davis
8	Bylaw/Parking	TCI
9	Facilities Planning and Operations	TCI
10	Recreation Administration, Operations and Environment	TCI
11	Permissive Tax Exemptions and Grants	TCI
12	Nanaimo Economic Development Corporation, including Tourism	Ludmila Jagiellicz
13	Downtown Nanaimo Business Improvement Association	TCI & Ludmila Jagiellicz
14	Building Permits and Inspections	TCI
15	Subdivision, Development, Land Use Planning and Approvals	TCI
16	Vancouver Island Conference Centre	TCI

#	Corporate-wide Processes	Responsible Team Member(s)
1	Strategic planning, business planning and budgeting	TCI & Jerry Davis
2	Capital projects planning and development	Jerry Davis
3	Asset management	Jerry Davis
4	Project management	TCI
5	Purchasing and contract administration	Doug Zabkar
6	Performance Measurement	Jerry Davis

### 4.0 Review Approach

#### 4.1 Approach for reviewing Departmental Service Areas

WMC has developed a generic approach with 9 components (given below) to conduct the reviews of the departmental service areas that are in-scope. For each review, **the generic approach will be tailored** according to the unique characteristics of each departmental service area.



Details of the types of information that will be researched and gathered for each component is provided below. Please note that only topics relevant to each service area will be explored, additional topics may be explored as necessary.

#### Service Description / Delivery Model

- Service/organization mandate
- Mandatory (legislated), foundational(corporate) or discretionary services
- Description of the service relative to clients served and how they access the service
- Roles and responsibilities of service providers
- Service delivery process or model;
- Relevant policies, regulations and directives
- Service level
- Capital and operating costs
- Manager and staff numbers
- Use of contractors
- Assets / technology / systems used.

#### Other Services Offered by this Department & Relationship to this Service

- For those departments where this service is composed of multiple services, prioritize the services that should receive greatest attention (based on budget, public sensitivity, etc.).
- Other departments / business units involved in the delivery of this service.

### Service Linkage to Nanaimo Strategic Plan

- A description of the extent to which the service is consistent with and makes reference to Nanaimo Strategic Plan's Vision and Goals.

### Purpose of the Service & Objectives

- A description of the purpose of the service and the objectives it is intended to achieve

### Service Demand Factors & Issues

- Identify factors affecting costs / service level; fees and charges including impact of service level change on marginal costs and revenues. How are these service demand factors being managed; are they likely to change in the future?

### Public Use of Service / Customer Profile

- Identify and describe profile of Nanaimo residents who benefit from this service, e.g. general public, specific age groups, user organizations, etc.
- Review public/client satisfaction information and tools to engage and inform the public in regards to the service

### Service Levels, Outcomes & Performance Measures

- Describe the service level of this service
- How was this service level established
- Is this service level published?
- What are the expected outcomes and how were they determined
- What are the actual outcomes and how do the expected and actual outcomes relate to the desired service level?
- What performance measures have been established for this service, if any; is there multi-year data relative to this performance measure which can demonstrate trends?

### Purpose of the Service & Objectives

- Does this service provide information which is used to support one or more of the following Corporate processes:
  - Strategic planning, business planning and budgeting
  - Capital projects planning and development
  - Asset management
  - Project management
  - Purchasing and contract administration
  - Performance measurement

### Options for Change

- Investigate inefficiencies/opportunities for cost savings now and looking to the future. Evaluate labour and other costs associated with delivery model based on available data, analyse service delivery process relative to workflow problems e.g. bottlenecks, information gaps, duplication of effort, inadequate/obsolete technology/systems/methods, coordination/communication issues involving other departments upon which the service is dependent. Assess monitoring, quality control and

risk mitigation processes. Assess communications with clients and the public and the tools used e.g. website, public meetings, e-town hall, social media and satisfaction survey information.

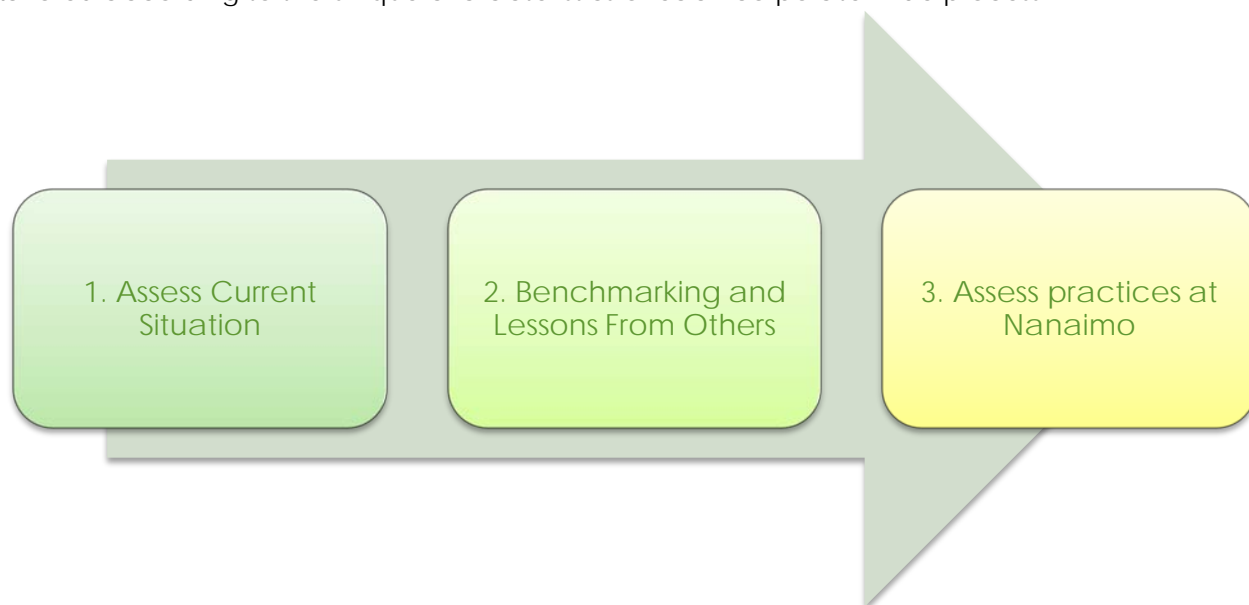
- How could service delivery be improved within the existing service delivery model?
- Are there alternative service delivery models which could be used to either replace or support the existing service delivery model, e.g. purchase of services / outsourcing
- What would be the benefits; what difficulties would there be in moving to an alternative service delivery model?
- What would be the impact on staffing, other municipal services and costs if the service delivery model were changed?
- Should the service level be changed; what would be the impact?
- Should the service be eliminated; what would be the impact?

Some of the **methods** that will be used for **information gathering** are:

- Interviews and focus groups with departmental managers and staff
- Review of master plans, business and operational plans
- Review of organization charts and staffing
- Review of operating and capital costs and trends
- Review of performance measurement documents
- Benchmarking with other BC municipalities based on available information
- Best practices from Canadian municipalities based on available information and consultant team experience

## 4.2 Approach for reviewing Corporate-wide Processes

WMC has developed a generic approach (given below) to conduct the reviews of the corporate-wide processes that are in-scope. For each review, **the generic approach will be tailored** according to the unique characteristics of each corporate-wide process.



### Step 1. Assess Current Situation

The first step of the review process is to assess the current situation relative to how the Council identified priority services and corporate processes are delivered. This step may include (but not limited to):

- Understand Council's objective in selecting the service or process for review
- Understand purpose/outcomes of the process or service
- Identify elements currently in place, in progress of development and planned
- Conduct interviews, focus groups and surveys involving Directors, managers and staff
- Understand existing roles, including lead role and roles of business units
- Review Standards used in and across departments
- Identify and analyze documents produced and templates
- Identify and analyze linkages to other processes or services
- Identify and analyze inputs and resources used
- Identify and analyze technology used to support

### Step 2. Benchmarking and Lessons from Others

- comparative benchmarking with 6 BC municipalities based on available data
- Gather lessons learned from the six and other municipalities – current and best practices

### Step 3. Assess practices at Nanaimo

- Assess the strengths, weaknesses and gaps of the practices at Nanaimo based on findings of steps 1 and 2.
- Identify opportunities for improvement and potential for cost savings
- Present Assessment power point report to Steering Committee

## 5.0 Timing

The team has commenced the Phase 2 work including service and process reviews on February 1, 2016 and will complete the reviews by April 8, 2016. Phase III work would be completed by May 13.