



Business Services

2018-2021 Business Plan
& 2018 Budget

Foreword

Our Vision for the Future

Mississauga will inspire the world as a dynamic and beautiful global city for creativity and innovation, with vibrant, safe and connected communities; where we celebrate the rich diversity of our cultures, historic villages, Lake Ontario and the Credit River Valley. A place where people choose to be.

Mississauga City Council approved **Our Future Mississauga**; a Strategic Plan to achieve this vision over a 40 year timeframe. The City engaged over 100,000 people to develop this Vision Statement. To achieve this vision the City has identified five Strategic Pillars for Change: **move**, **belong**, **connect**, **prosper** and **green**. Each year the City proposes various initiatives that are aligned with the Strategic Pillars and are intended to bring us closer to fulfilling our vision for the future. The City has over 300 lines of business which are consolidated into 16 Services Areas that are outlined in this Plan. The 2018-2021 Business Plan and 2018 Budget detail how and where the City plans to allocate resources to deliver programs and services.

The City is committed to providing programs and services cost effectively. In this Plan we have outlined measures that will help us assess the quality, efficiency and customer satisfaction that our services achieve. The results help inform decisions on resource allocation, direct program offerings and improve service delivery to ensure our vision is efficiently realized.



Table of Contents

Executive Summary of Business Services	3
Core Services	4
Vision, Mission, Goals of Service and Service Delivery Model	4
Current Service Levels and Trends	6
Performance Measures and Results	11
Balanced Scorecard	12
Awards and Achievements	14
The 2018-2021 Business Plan Outlook	19
Planning for the Future	19
Finding Efficiencies	23
Advancing the City's Strategic Plan	25
Transforming our Business with Technology	27
Managing Our Human Resources	29
Proposed Operating Budget	32
Operating Budget Details	34
Proposed Budget by Program	34
Summary of Proposed Budget	35
Proposed Cost Increase Required to Maintain Current Service Levels	36
Proposed New Initiatives and New Revenues	37
Proposed Capital Budget	50
Proposed 2018-2027 Capital Budget by Program	50
Proposed 2018-2027 Capital Budget by Funding Source	51
Proposed 2018 Capital Budget Detail	51
Proposed 2019-2021 Capital Budget by Sub-Program	52



Executive Summary of Business Services

Mission: To enable the delivery of excellent public service, Business Services provides quality advice and essential support to front line service areas within the City, as well as direct services to residents and businesses of Mississauga.

Services we provide:

Business Services includes five interrelated teams within the City of Mississauga. These teams all collaborate with and support every City service area. The group consists of Human Resources (HR), Finance, Communications, Corporate Performance and Innovation (CPI), and Revenue and Materiel Management.

Interesting facts about this service:

- Human Resources posted 510 jobs in 2016 and filled 73 per cent of positions within seven to 12 weeks
- Finance managed \$613.5 million in reserves, and achieved a 3.4 per cent gross investment return across the City's balance sheet
- Communications handled 309,100 telephone, email and online citizen inquiries via the 311 Citizen Contact Centre and 3,187 inquiries via the Pingstreet Citizen App
- Staff across the organization received 35,990 hours of training from Corporate Performance and Innovation to improve performance
- Revenue billed \$1.57 billion in property taxes for the City, Region and School Boards with a collection rate of 97.3 per cent

Highlights of the Business Plan include:

- HR is modernizing Talent Management by leveraging technology. HR will also advance the Diversity and Inclusion Strategy and enhance learning and development
- Finance is initiating corporate asset management planning, a Development Charges study, and investing in financial system tools to improve internal business processes
- Communications will continue implementing the Digital Strategy and will begin to implement year one key recommendations of the Corporate Customer Service Strategy, while supporting priority projects (i.e., 2018 municipal election, Ontario 55+ Summer Games, Hurontario LRT)
- Corporate Performance and Innovation is supporting the organization to improve efficiency and effectiveness, strengthening the culture of continuous improvement across the corporation
- Revenue is developing online services such as e-bidding to improve efficiency and e-evaluation to enable the City to evaluate bids electronically and implement a sustainable procurement policy

Net Investment (000's)	2018	2019	2020	2021
Operating	30,456	30,827	31,447	31,873
Capital	1,396	1,406	150	260
Full Time Equivalents	289.4	283.4	279.4	276.4

Core Services

Vision, Mission, Goals of Service and Service Delivery Model

Vision

To be the service provider of choice.

Mission

- To enable the delivery of excellent public service, Business Services provides quality advice and essential support to front line service areas within the City, as well as direct services to residents and businesses of Mississauga
- Human Resources – To promote excellence in people by delivering innovative Human Resources strategies and programs that enable clients to successfully achieve their business goals
- Finance – To provide reliable, comprehensive advice, reports and policies that enhance our stakeholders' decision making and management of resources
- Communications – To enhance citizen self-service and access to local government. To invest in our people and technology to enrich what and how we communicate
- Corporate Performance and Innovation – To work collaboratively with our clients to improve business operations and to deliver sustainable value to their clients
- Revenue and Materiel Management – To administer the property taxation program and collect revenues to sustain City, Region and Education services and to create value through strategic procurement

Service Delivery Model



Goals of Service

- **Human Resources:** To support the Corporation in achieving its strategic goals and business objectives through innovative HR strategies; to deliver HR solutions that meet City business needs, with a focus on resources and effort in three Strategic Priority Areas: Talent Management, Healthy Workplace, and Strategic HR Business Partnership, and to modernize and enhance HR processes and practices by leveraging technology and social media platforms
- **Finance:** To deliver accurate, timely, and relevant information to stakeholders; to develop and administer policies and processes that enhance financial reporting, manage assets and facilitate compliance with legislation and accounting standards; to collaborate with City staff to deliver projects and services efficiently, and to develop our human resources through succession planning and recognition of performance excellence
- **Communications:** To deliver communications that embody the standards and values of the Communications Master Plan and ensuring that citizens:
 - Are well informed and engaged
 - Have easy access to the information they need and want
 - Can access information on the channels of their choice
- **Corporate Performance and Innovation:** To support the organization to improve strategic and operational efficiency and effectiveness by collaborating with staff and senior management to identify and implement achievable cost saving and revenue generating opportunities; to strengthen the culture of continuous improvement through Lean and other processes across the organization by giving staff the training and support required to deliver improvements and

innovation on projects, processes, and team collaborations, and to assure policies are current and relevant by creating new policies and revising existing ones in accordance with the Policy Program timelines and criteria, and through continuous communication with City staff

- **Revenue and Materiel Management:** To ensure accuracy and integrity when administering and collecting property taxes; to enhance web experience by enabling electronic information exchange and alternate communication channels; to grow value through sustainable procurement strategies such as e-evaluation and e-bidding; to continue to provide excellent customer service to internal and external clients; to develop and improve online self-serve options, and to continuously update the TXM Tax Manager software to operate more efficiently



Current Service Levels and Trends

Each of the five teams within Business Services provides an array of different services at different levels. Below are some examples of services provided, as well as some of the trends that will affect service provision going forward.

Human Resources Examples

- Service Level Agreements (SLAs) have been developed for some HR services
- Response time for Requests and Inquiries target is to respond on the same day and, if not resolved, follow up within two days
- In 2016, HR Shared Services received approximately 11,300 emails and 3,000 calls
- HR supported 510 job competitions in 2016

Key Trends in HR

War for Talent: (Acquire, Develop, Lead and Recognize)

- Labour market skills shortages particularly in niche, technical and leadership jobs
- Shift from traditional talent acquisition and assessment methods to a significant focus on social media and professional networks, e.g., professional network platforms, video interviewing, objective behavioural assessments
- Heightened candidate expectations and needs
- Other municipalities and the broader public sector are pursuing the same talent pool
- Expect higher than normal turnover and loss of talent in the future

- Increased diversity in the labour market resulting in increased requirement for diversity initiatives

Technology: Automation and Modernization

- HR technology landscape is changing more rapidly than ever before
- The current technology shift is described as the “Consumerization of HR technology” (i.e., more tools for employees and applicants)
- Key technology trends such as mobile devices/apps, social networking, “cloud technology” and “big data” processing capability are now prevalent



Finance Examples

- Supports the administration of a \$1-billion gross City budget, connecting with 16 service areas
- Monitors 270 capital projects in progress
- Processes 77,000 accounts payable transactions annually
- Co-ordinates the production of the annual Business Plan and Budget; oversees the Business Planning and Operating/Capital budget process; produces the Annual Financial Report, quarterly forecasts and year-end results
- Provides strategic corporate financial planning, financial management and control services to Council and senior management. Prepares the City's long term financial plan, Development Charge By-law updates and maintains the City's financial policies



Mississauga City Centre

Key Trends in Finance

- Innovations in Information Technology continue to influence the way business is done. The new analytical tools are providing more insights and trends that assist in improved decision making
- The dynamics of human resources in the Finance sector are changing, and the changes are driving a need to continuously develop, rotate, second, and advance staff
- Development and ongoing maintenance of policies and standard operating procedures that ensure business processes are current, effective, reliable and conveyable
- Financial reporting and procedural efficiencies through Lean training and embedding that leads to project implementations which meet financial service excellence goals



Communications Examples

- In 2016, Communications issued 221 media releases featuring news about City programs and services. These resulted in 3,691 mentions in stories online, on television, on radio or in print
- Twitter followers numbering 47,000 saw 2,276 tweets from the City Corporate account
- The City's 538 Facebook posts helped inform its 17,000 Facebook followers about important City issues, upcoming events and project updates
- The 311 Citizen Contact Centre had 309,100 citizen interactions and 3,187 inquiries via the Pingstreet App
- Communications supported 96 official and City partnership events



Key Trends in Communications

As communicators we are faced with the challenge of connecting with citizens in a world that is becoming ever more complex and cluttered. The web, digital marketing and citizen advocacy are changing the way we communicate. As communication vehicles and audience preferences evolve, so must we. Today, successful communications need to be integrated and aligned and most importantly, customer-centric, reaching citizens where, when and how they prefer.

The Communications Division is well positioned to proactively respond to these service and communication level trends. Comprised of a centralized team of professionals with specialized skills, and an in-depth knowledge of the organization and its business operations, the Division develops innovative and engaging communication content strategies.

Over the last year a number of initiatives have been started, developed or launched to respond to these trends, including:

- **Digital Strategy Project:** Will provide high quality self-service experiences that make the City's Website the preferred choice of citizens and businesses who want to engage with the City
- **Project Management Tool:** Refining the Division's comprehensive project management tool to improve project intake, project/time management, and reporting
- **Customer Service Strategy Project:** Will modernize customer interactions with the City providing residents with a satisfying end to end experience
- **Citizen Community Engagement Software:** This tool will provide online public engagement to allow more people to be involved in our City conversations

Corporate Performance and Innovation Examples

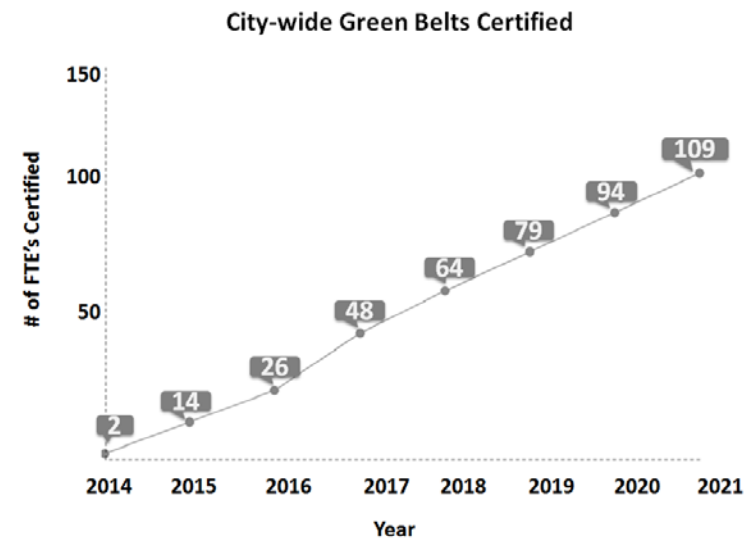
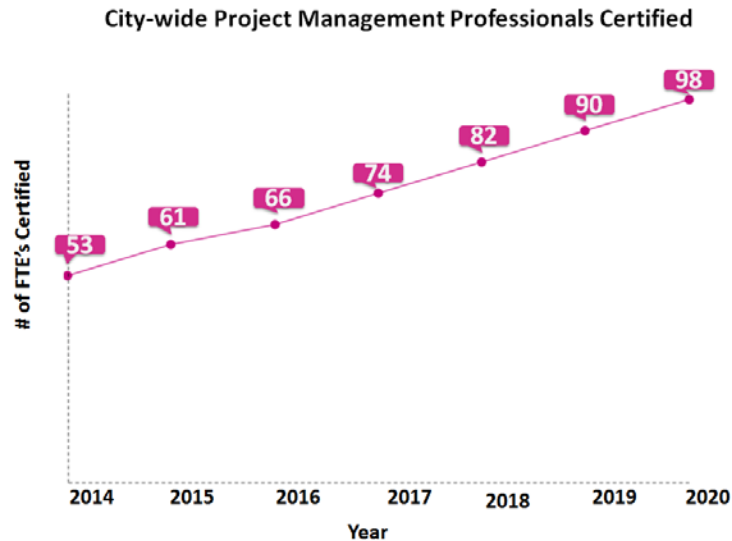
CPI is experiencing increasing demand for management consulting services, business innovation services, project management support services, and Lean services.

Key Trends in Corporate Performance and Innovation

The demand for the following CPI services is increasing:

- Value Optimization, i.e., service reviews, capacity studies and business cases
- Program and Strategy Development, i.e., new and existing program design, and strategy development

- Consensus workshops and customized strategy development sessions
- Customized project management solutions
- Support for the Project Management Professional Certification
- Training and obtaining Yellow and Green Belt Certifications
- Coaching and support in process improvement initiatives



Revenue and Materiel Management Examples

Revenue

- \$1.57 billion in annual property taxes billed on behalf of the City, Region of Peel and school boards from 226,000 property tax accounts
- 97.3 per cent of taxes billed were collected in 2016
- 5,510 accounts receivable invoices issued in 2016 totaling \$24.5 million
- Over 15,000 pieces of correspondence responded to within a 10 day turnaround time
- Over 66,000 in-person public inquiries or payments at the Tax Counter, Cashiers and Welcome Desk

Materiel Management

- 552 Purchase Orders issued
- 75 day service level for standard contract procurements
- 140 day service level for custom contracts (proposals)
- 25 day service level for short form contracts (quotations)
- Two day response time for bidder inquiries
- 166 Bidding procurements in 2016

Key Trends In Revenue and Materiel Management

- City growth: increase in resident, client and business inquiries
- Ongoing support and improvements to modules required for TXM Tax Manager
- Increase to online and self-serve options on the City's Website and E-tax services due to changing customer needs and expectations
- Increase in procurements to meet the needs of service areas
- Flexible procurements that focus on value rather than price
- Focus on sustainable procurement

Performance Measures and Results

The City of Mississauga is committed to delivering services economically and efficiently. The City's Performance Measures are used to help assess how well we are doing at achieving our goals and where we need to improve operations. The results also inform decision making and strengthen accountability. The following section describes some of the measures that we use and provides context for results. The Balanced Scorecard shows trends since 2014 and expected outcomes up to 2021.

What we are measuring - examples

- Human Resources Division employs key HR industry metrics such as employee satisfaction with the City of Mississauga, employee turnover, succession program participants, and recruitment service level success rate
- Finance uses metrics such as credit rating, investment yield, and percentage of projects completed. Finance undertook a review of its performance measures for the 2018 budget. This review resulted in the introduction of some new metrics which include feedback from Council and clients, Finance employee engagement, and the number of process improvement projects completed
- Communications regularly reviews and monitors a number of related performance indicators, broadly categorized into the following areas:
 - Audience Reach
 - Content Effectiveness
 - Channel Management
 - Customer Service & Satisfaction

- CPI uses metrics such as training hours delivered, customer satisfaction with training, repeat business, and the number and dollar value of City-wide Lean initiatives
- Revenue and Materiel Management measures taxes billed and collected, customers served either in person or through correspondence, PCard spending, overall employee satisfaction and engagement, and volume of tax bills, purchase orders and appeals

Why these measures are important - examples

Tracking investment yield allows us to compare how our investment management strategies and actions perform against those of other municipalities and the economy in general.

In Communications, audience reach measures the extent to which City information actually reaches its intended audience(s). Content effectiveness measures tell us about the extent to which content is engaging, accessible and written in plain language.

CPI's measurement of repeat business provides an indicator of the extent to which clients are satisfied with service and find value in the solutions provided.

How we are improving results - examples

The Recruitment Service Level Success Rate, for example, has allowed HR to identify and resolve bottlenecks in the recruitment process. This led in 2016 to a three per cent improvement in the number of positions filled within expected timelines.

A collection module was implemented in TXM Tax Manager to automate the collection process, thereby improving the Taxes Receivable Collection Rate.

Balanced Scorecard

A Balanced Scorecard identifies and measures four key areas of an organization's performance: Financial, Customer, Employee, and Business Process. By paying attention to all four areas, an organization can retain balance in its performance and ensure that it is moving towards the attainment of its goals.

Each group within Business Services has its own set of metrics that fall into each of the four scorecard categories. The Business Services Balanced Scorecard includes examples from each group.

Financial Measures

- *Credit Rating* – this third party measure demonstrates the financial strength and viability of the municipality along with the ability to secure lower borrowing costs. 'AAA' is the highest rating conferred by a bond rating agency
- *Lean Cost Savings* – measures the City-wide reduction in the cost of delivering service as a result of process changes
- *Lean Cost Avoidance* – measures the difference between costs that would have been incurred without a Lean process change and costs after the Lean process change has been made
- *Taxes Receivable Collection Rate* – measures the percentage of taxes receivable that are collected by the City. This measure allows us to gauge cash flow and meet payment requirement for the Region and school boards. The City's collection rate is favorable for a large Ontario municipality

Customer Measures

- *First Call Resolution (FCR)* – for 311 measures the percentage of calls addressed and resolved the first time a resident calls 311 (i.e., "one and done")

- *311 Service Level* – measures key service level commitment to answer 80 per cent of calls within 30 seconds

Employee Measures

- *Employee Turnover* – has a significant operational and financial impact on the organization. It is measured to address and plan for attrition and talent retention, and as an indicator of how effective our recruitment practices are in selecting best fit candidates
- *Leadership Succession Program Participants* – this measure is reviewed on a regular basis as part of the City's Succession Program. The program allows the organization to build an internal talent pool and to develop that talent. With the predicted increase in turnover, especially with retirements and skill shortages in the external labour market monitoring this program is particularly important

Business Process Measures

- *Recruitment Service Level Success Rate (Time-to-Fill)* – measures the rate of success the Division achieves in meeting the 12-week time-to-fill target. The metric allows the Division to evaluate the efficiency of the recruitment process, and to identify and address bottlenecks
- *Target Plain Language* – measures the plain language readability level of all corporate communications (target is within grade 10-12 range)

Balanced Scorecard (Cont'd)

Measures for Business Services	2014 (Actual)	2015 (Actual)	2016 (Actual)	2017 (Plan)	2018 (Plan)	2019 (Plan)	2020 (Plan)	2021 (Plan)
Financial: <input type="checkbox"/>								
Credit Rating	AAA	AAA	AAA	AAA	AAA	AAA	AAA	AAA
Cumulative Lean Cost Savings	\$138,280	\$540,187	\$1.2M	\$2.1M	\$3M	\$4.2M	\$5.4M	\$6.7M
Cumulative Lean Cost Avoidance	\$38,186	\$373,293	\$1.1M	\$2.5M	\$4.3M	\$6.5M	\$8.9M	\$11.4M
Taxes Receivable Collection Rate	98%	98%	97%	98%	98%	98%	98%	98%
Customer:								
311 Citizen Contact Centre First Call Resolution (FCR) - Gross	83%	82%	93%	90%	90%	90%	90%	90%
311 Service Level (80% of Calls Answered within 30 seconds)	79%	82%	80%	80%	80%	80%	80%	80%
Employees:								
Employee Turnover	4.1%	3.6%	4.3%	4.5%	4.7%	4.9%	5.1%	5.3%
Leadership Succession Planning Program Participants	95	150	178	180	180	185	185	190
Internal Business Process:								
Recruitment Service Level Success Rate	n/a	70%	73%	80%	80%	85%	85%	85%
Target Plain Language	40%	63%	63%	70%	75%	80%	80%	80%

Awards and Achievements

HUMAN RESOURCES

Achievements

- Developed Talent Acquisition Strategy incorporating the new Employer Brand
- Developed Workplace Diversity and Inclusion Strategy
- Increased participation in the succession planning program. In 2016 participation in the program was 178 (an increase from 150 in 2015)
- Launched the insight learning platform in June 2016 to enhance e-learning and leadership training. It has been accessed 10,272 times
- Implemented mobile pay statements by leveraging current technology
- Recruitment Service Level Success Rate has allowed HR to identify and resolve bottle necks as part of Lean and continuous improvement efforts

Awards

- Forbes 2016 Canada's Best Employer in the Government Services category
- Finalist for the Institute of Public Administration of Canada (IPAC) 2016 award for Innovative Management for the HR Service Level Agreements



City wins Canadian Forces Liaison Council (CFLC) Award, Most Supportive Employer 2017

FINANCE

Achievements

Financial systems enhancements in 2016:

- Questica budgeting system
- Employee Self Service (ESS)
- Fiori system for time off requests
- ESS Electronic T4s (approximately 3,800)
- Work In Progress (WIP) reporting and dashboard for project managers
- Caseware for financial statement presentation and auditing

- Implemented expense card receipt imaging, reducing the paper flow and cycle time of approval of expense reports
- Implemented a new automated expense card audit tool, replacing manual audit process
- SharePoint for file management and collaboration (won the Corporate Award for Innovation)

Business process reviews in 2016:

- Reserve review resulting in cleaner balance sheet for financial reporting purposes
- Lean reserve cheque deposit process efficiencies
- Lean accounts payable invoice turnover process efficiencies

Awards

- Government Finance Officer Association (GFOA) Distinguished Budget Award for the 2016 Business Plan and Budget, the 27th consecutive year the City has received this award
- Canadian Award for Financial Reporting from the GFOA, one of the highest honours for municipal financial reporting, for the 19th consecutive year
- Twenty-six Finance nominations for Corporate Awards



GFOA Award for Excellence in Financial Reporting



GFOA Distinguished Budget Award

COMMUNICATIONS

Awards

- International Association of Business Communicators (IABC) 2017 Ovation Award of Excellence for Camp Ignite Media Relations
- International Association of Business Communicators (IABC) 2017 Ovation Award of Merit for the 2016 Ontario Summer Games
- Place Marketing Forum 2017 Laureate Award for City of Mississauga Branding
- 2017 Summit International Bronze Award in the category of Government Video for the Ontario Summer Games Video
- 2017 Government Finance Officers Association (GFOA) Award for Excellence in Financial Reporting (with Finance)
- 2016 Association of Registered Graphic Designers (RGD) In House Design Award for "City of Mississauga Branding"
- 2016 RGD In House Design Award for "City of Mississauga Library Marketing Creative"



International Association of Business Communicators Awards



Council presentation of the Place Marketing Forum 2017 Award to the City Brand Project Team

Internal

- Community Partnership – Team Award for the 2016 Corporate Awards as part of the Ridgeway Community Courts Project Team
- Community Partnership – Team Award for the 2016 Corporate Awards as part of the Sweat Lodge and Healing Circle Installation at the Museums of Mississauga
- Excellence in Working Together – Team Award for the 2016 Corporate Awards as part of the Hickory Drive Incident Management Team
- The Brenda Sakauye Environment – Team Award for the 2016 Corporate Awards as part of the LED Street Lighting Conversion Project

CORPORATE PERFORMANCE AND INNOVATION

Awards

- International Association of Facilitators (IAF) Impact Award for Excellence in Facilitation – Awarded to the City of Mississauga and Karyn Stock-McDonald, who is a rare two-time recipient of this award
- Excellence in Project Management Award – Project Team Category - Received for the Life Science Cluster Strategy Report
- Excellence in Project Management Honorary Award – Project Team Category – Received for the Graffiti Project



Karyn Stock-McDonald receiving IAF Award



Honorary Excellence in Project Management Award – Project Team Category

Nominations in Partnership with clients

- City Manager's Award of Excellence for the Life Science Cluster Strategy Report in collaboration with the Economic Development Office
- Community Partnership Award for the Project Management Public Sector Forum held at Sheridan College Mississauga Campus alongside several vendors
- City Manager's Award of Excellence – Developing Stormwater Charge policies
- Excellence in Working Together - Redesign Mobile Responsive – recognition for introducing a new way to access information



Corporate Performance and Innovation and the Economic Development Office Receiving the Excellence in Project Management Award – Project Team Category

REVENUE

Achievements

Revenue and Materiel Management staff completed two Lean belt projects and 26 small improvements. Some of the improvements include:

- Digitization of electronic payments
- Implemented a dashboard for tracking of counter customers
- Procurement kits modified to include compliance checklist
- Consolidated the process of creating multiple journal vouchers to one, reducing effort and avoiding errors
- By applying Lean tools and principles, front line staff streamlined the enrolment process for pre-authorizing automatic tax payments and completely eliminated a backlog of applications. Enrolment, which used to happen only twice a year, now occurs 'on the spot'. The streamlined process has increased the number of people using pre-authorized payments for their taxes, and takes 94 per cent less time

Awards

- Recipients of the Outstanding Agency Accreditation Achievement Award from the National Institute of Governmental Purchasing (NIGP)
- 2016 Corporate Awards for Excellence in Customer Service – Individual, Excellence in Working Together
- The Brenda Sakauye Environment Award

The 2018-2021 Business Plan Outlook

Planning for the Future

The right policies, processes, services and service management will guide Business Services to meet the needs of its internal and external customers. Advances in Information Technology will increasingly help Business Services fulfill its responsibilities efficiently.

HUMAN RESOURCES

Human Resources will continue to leverage technology to modernize and automate HR business processes and practices. The Division will implement initiatives to create an environment that supports diversity and inclusion. The business plan includes:

- **Modernizing HR technology** to implement and optimally utilize solutions designed to support best HR Management practices. This includes social media and cloud platforms; mobile applications, and a Talent Management System. The new Talent Management System will transform all HR business processes in three years (2017-2019)
- **Enhancing learning and development opportunities** for employees and leaders at all levels. This will enable development of talent at all levels in the organization, increase job satisfaction and lower employee turnover
- **Enhancing audit and compliance tools** to automate and reduce manual processes that will improve City policy, union collective agreement and policy and legislative requirements
- **Utilizing more mobile applications** since mobile technology has grown significantly in recent years and is quickly becoming a primary technology platform (e.g., mobile applications for Time and Labour tracking)
- **Ensuring the City has the necessary resources** to implement the initiatives from the Workplace Diversity and

Inclusion Strategy, thereby one new staff (1 FTE) for 2019 - Diversity and Inclusion Co-ordinator is being requested

FINANCE

The Finance business plan includes:

- **Modernizing Corporate Asset Management** – Corporate Asset Management is critical to City's long term financial plan and strategic direction. This initiative supports departments' continued delivery of asset management functions, through the development of corporate Asset Management policies and plan implementation to ensure standardization of data management and practices. It will provide staff and Council with the information required to objectively and systematically assess the overall condition of City infrastructure. Future government infrastructure funding will require corporate asset management plans before any funding is granted
- **Automating Energy Management Billings** - The City processes close to 7,000 utility bills annually, worth approximately \$22 million. The City also maintains energy management systems that monitor and regulate usage and efficiency opportunities. Integration of billings from utility companies with energy management systems and financial payment systems will reduce manual workflow and automate usage validation and payment approval
- **Managing Development Charges** - As the City enters a redevelopment phase by transforming from green fields to infill development, development charges (DC) are collected from this new type of development. These DC funds are used to construct new infrastructure related to the increased growth occurring within the City. Assessment and prioritization of growth-related projects are critical to ensure the timely delivery of services to the residential and business

communities. The current DC By-law was approved by Council on June 25, 2014 and has a five year lifespan. A new DC By-law must be enacted by Council by June 25, 2019 to continue to allow the City to collect fees related to new development. Work will commence in 2018 in preparation for a new DC Background Study and By-law in 2019. The work to be undertaken will include a review of existing policies and incorporate changes from Bill 73 affecting the *DC Act* and its Regulations

- **Implementing the final phase of Long Range Financial Planning** - this includes development of reserve and reserve fund corporate policy and documenting the standard operating procedures
- **Automating Accounts Payable** - The Accounts Payable (AP) system is currently a paper-based system with opportunities to automate manual processes. There are two phases to the AP automation project. The first phase, currently in progress, is to consolidate all employee expenses into one monthly expense report. The expense report will include scanned supporting documents and embed workflow for payment approval. The second phase, scheduled for 2018, is to further automate AP processing through an Optical Character Recognition (OCR) program and embed approval workflows. Both solutions are web-based and easy to use from any mobile device or computer. Accompanying both of these automated processes are improved reporting and analytics

COMMUNICATIONS

Citizens continue to say that Mississauga is a great place to call home. Results from the 2017 citizen satisfaction survey indicate that over 89 per cent of residents rate the overall quality of life as excellent or good while 84 per cent indicate they are 'Proud to say they are from Mississauga'.



Mississauga, a great place to call home

As Mississauga continues to grow into a large urban municipality, with a population that is projected to reach 824,000 by 2021, understanding and delivering upon our citizens' needs, preferences, and values will be critical.

In the Communications Division, the citizen is at the heart of everything that we do. We ensure that we listen and respond to the voice of the citizen today and in the future, including:

- **Providing accurate information, on a timely basis, on the channels, devices and platforms** that our citizens prefer

- **Delivering high quality and consistent experiences** with all citizen touch points to ensure high levels of customer satisfaction and to promote a positive City reputation
- **Creating opportunities for our citizens to become more engaged** with topics that are important to them and the community and creating actionable insights from the learnings

By applying a strategic communications framework that is research and evidence based and forward looking, the Communications Division has identified four key initiatives to deliver upon our citizen centric mandate in 2018. They are:

- Continued implementation of the **Digital Strategy**
- Implementing key recommendations from the **City-wide Customer Service Strategy**
- Continued focus on citizen information including a **City-wide advertising strategy and partnerships**
- Updating the **Communications Master Plan**

CORPORATE PERFORMANCE AND INNOVATION

Corporate Performance & Innovation will continue to plan for the future by:

- **Continuing to review and enhance service offerings** to meet changing organizational needs
- **Expanding shared services partnerships** throughout the Corporation
- **Project Management Support Program** - In 2016, the Project Management Support program established a five-year plan to expand and customize its services to suit the future needs of project leads in the organization. Input from the training and customer satisfaction surveys and Project Management Advisory Committee members provides us with

insight into the needs and unique challenges of delivering projects in each department. This allows us to build custom tools and services. Key features include:

- Expanding the project management methodology, training, and tutoring group
 - Developing a framework for a mentorship program
 - Upgrading project sites
 - Continuing to deliver customized project management solutions
- **Business Innovation Program** - The Business Innovation program will continue to develop customized products and services to drive innovation. The program will continue to share and showcase its excellence in innovation through external networking. The program focus is customer engagement through customized coaching and facilitation services to help drive innovative change. It utilizes a team of Business Innovation Coaches at large across the organization to foster innovative thinking. The program also runs a Community of Practice where employees are provided opportunities to network, share knowledge, acquire skills and gain recognition
- **Lean Program** - The Lean Program's plan consists of embedding Lean and supporting major process review projects in all City divisions within the next two years. The Lean Money Belt Program has been developed with Finance staff to validate and measure the benefits of completed Lean improvements. In order to achieve the current and future goals, Lean continues to emphasize the voice of the customer to deliver sustainable process improvements. As part of the Lean Office's engagement process, customer needs are identified through a variety of methods including
 - Customer and employee interviews and surveys to address gaps

- Training surveys issued after White and Green Belt sessions to ensure training meets the attendees' needs
- Lessons Learned sessions held semi-annually with the participants of Lean reviews to capture new program improvements
- **Corporate Policy Program** - Corporate Policy Program will continue to ensure all policies remain current by reviewing policies once every three years. There are on average 70 policy reviews annually varying in scope from minor housekeeping to a complete rewrite. The program has introduced a new service level target to complete 85 per cent of policies that are scheduled for review within the timelines set by the Leadership team
- **Management Consulting** - Management Consultants assist senior management with the review of service areas, organizational improvement initiatives, and various projects of strategic and corporate significance. The recommendations/advice provided by Management Consultants is impartial and independent, and recommendations are structured to be forward thinking while recognizing the need for practical "real life" implementation

REVENUE AND MATERIEL MANAGEMENT

- **TXM improvements** - The tax area has been a leader in automation for many years with the ongoing in-house development of the TXM Tax Manager software for the billing and collection of property taxes. This state of the art system is licensed to four other GTA municipalities and manages \$1.57 billion in tax revenue. TXM has allowed the tax area to minimize the number of staff despite constant changes and complexity in the Province's property tax regime. There are still areas where further automation is necessary in order to eliminate manual processes, improve

timeliness, efficiency, data quality, enrich the customer experience, and enhance our ability to market the system. With outside services to provide technical advice and additional resources, an aggressive development schedule can be met which will ultimately better align the system with business processes, eliminate duplication of effort and automate work

- **Improving POA Fines Collection** - The Revenue section continues to look for ways to improve on the collection of defaulted POA fines that have been assigned to the Collections unit. Staff issue collection notices, contact offenders, establish payment arrangements, add fines to Mississauga property tax accounts and the tax rolls of other municipalities and manage collection agencies. Legal Services may also pursue legal action as an additional collection effort
- **Sustainable Procurement Policy** - The City is committed to continuously improve the social and environment impacts of its procurement of goods and services in a transparent and accountable way that balances responsibility, social equity and environmental stewardship. Materiel Management is implementing a Sustainable Procurement Policy that will incorporate social, ethical and environmental considerations in the procurement of goods and services. To facilitate this cultural shift, a robust communication and training program will be implemented



Finding Efficiencies

Cost containment and efficiency are core principles of service across the Corporation. In this section are examples of some of the activities that the teams in Business Services are undertaking to make the work they do more efficient, in order to maximize the value achieved by the resources the City manages on behalf of its citizens and businesses.



- **Review of the Performance Management program**, to modernize the program, make it more efficient, user-friendly and automated
- **Review of the Corporate Awards process**, to streamline the process and decrease staff hours required
- **Review of key HR business processes through the implementation of Talent Management System**, to modernize, make more efficient and automate all HR business processes. The intent is to review all HR processes in the next three years
- **Review new hire process for temporary positions City-wide**, to streamline the administrative process of temporary staff hired in the field by Managers, e.g., staff in Community Services
- **Assessment of Finance Systems**, to identify and

document key existing processes, challenges, issues and concerns related to processes and systems and opportunities and make recommendations

- **Assessment Appeal Tracking Project**, to develop a tracking system to meet deadlines as prescribed by the Assessment Review Board (ARB) new Rules of Practice and Procedure and manage appeals more effectively
- **Streamlining workflow**, for a more efficient use of the current staff complement with the Communications Intake Project Module
- **Multiplying value** by applying an existing solution (insight) to internal CPI course registrations, to eliminate process duplication (complete)



- **Lean Green Belt project - Work In Progress (WIP) Process**, to reduce WIP cycle time, enhance access to information and improve data quality (complete)
- **Lean Green Belt Revenue Inquiry Handling**, to improve response times and ensure efficient distribution of inquiries with an aim to have one point of contact
- **Lean Green Belt Bus Parts Purchasing Review**, to reduce the number of blanket orders and examine more efficient ways to buy

-
- **Lean Yellow Belt Capital budget process review**, to enhance data quality and standardize processes between departments
 - **Lean Yellow Belt Tangible Capital Asset (TCA) process review**, to leverage data gathering in the budget planning process and move this information to approved budgets in order to eliminate manual processes that will reduce lead time and administrative effort
 - **Lean Yellow Belt Electronic Funds Transfer review**, to review the increasingly-used process and streamline payment tracking, sourcing, and accounting
 - **Lean Yellow Belt Pre-Authorized Tax Payment Plan Improvements**, to streamline the internal process allowing for more flexibility for enrollment and enhancing customer service (complete)
 - **Lean Yellow Belt Vendor Name Change**, to streamline the process for changing purchase orders and contracts when a vendor has changed names (complete)
 - **Lean Yellow Belt Senior Rebate Process**, to streamline the process and improve lead times related to processing of seniors tax rebates
 - **Central Stores Closure** - The City has operated a Central Stores facility for many years, procuring, warehousing and delivering goods to over 100 City facilities. Central Stores has a large indoor storage facility, offices and an outdoor storage facility. There is a significant cost to operating a warehouse including staff, and building maintenance and operation. Additionally, the stocking of many different items based on a wide variety of requirements has caused expensive write offs over time as needs change and stock becomes obsolete. The Central Stores operation was reviewed and it was determined that the business model was no longer viable. Many more options exist such as outsourcing the supply and delivery of items and procuring vendor managed solutions. Through alternate sourcing, Materiel Management was able to reduce inventory by 80 per cent. The significant reduction in inventory items, space utilization and staff workload has led to the current Central Stores model being unsustainable. As a result Central Stores will be closed in Q1 of 2018. Savings of \$188,000 including two (2) FTE positions will be realized in 2018. Additionally, savings from the elimination of the operation will arise from repurposing the warehouse space for other uses. By repurposing the Central Stores facility, space will not have to be acquired which will result in savings of \$3.4 million

Advancing the City's Strategic Plan

All teams in Business Services support and contribute to the advancement of Mississauga's Strategic Plan.

move - developing a transit oriented city

- HR supports the City's efforts to develop a transit oriented community by partnering with the business in the staffing and training of Transit staff and continuously improving recruitment strategies to hire the best people
- Finance provides an integral role in securing one-time incremental funding from the federal and provincial government for public transit infrastructure. These efforts have allowed for funding on projects such as the Mississauga Transitway and the acquisition of MiWay buses
- Communications supports the City's efforts to better connect communities within Mississauga and the wider region by promoting and communicating key transit initiatives such as the Advanced Transportation Management System, completion of the Transitway and Hurontario LRT

belong - ensuring youth, older adults and new immigrants thrive

- People Strategy (2015-2017), which is aligned with the City's Strategic Plan, commits to actions that will help us attract, retain and engage high caliber employees in a supportive work environment and connect them to our business needs. The City's demographics are changing faster than ever before, increasing the diversity in the population. The Workplace Diversity and Inclusion Strategy will be implemented in order to create a respectful and supportive workplace
- Communications plays a critical role in ensuring all citizens, including youth, older adults, and new immigrants, have access to the information they need, and opportunity to engage with the City. The new City Information Advertising Strategy will further solidify how we achieve this
- Revenue offers a Tax Rebate for low income seniors and low income persons with disabilities that occupy their home. The rebate is applied to offset property taxes for those who qualify

connect - completing our neighbourhoods

- Communications supports the celebration and promotion of the rich diversity of Mississauga, as well as reflecting and responding to that diversity, in both the channel and content we use to communicate information to citizens. The new Diverse Communities Promotion Campaign as well as the annual Mississauga Welcome Day are just a few of the examples of how we align with this pillar
- Finance facilitates periodic Development Charge studies which shape the City's future addressing issues like land-use intensification and rapid transit planning through Official Plan Amendments and development permit systems

-
- Revenue is developing a Tax Policy Future Strategy to determine if changes could enhance housing affordability. If the strategy is implemented, at the end of the three years, the multi-residential property tax class would be taxed at the same level as all other residential properties

prosper - cultivating creative and innovative businesses

- By providing citizens and local businesses with easy, accessible information, and the ability to communicate with the City when it's convenient for them, the Communications Division supports a strong and entrepreneurial business environment
- CPI's advice and continuous improvement programs assist business units to deliver the right services and demonstrate value for money, ultimately playing a vital role in the implementation of the Corporate Strategic Plan

green - living green

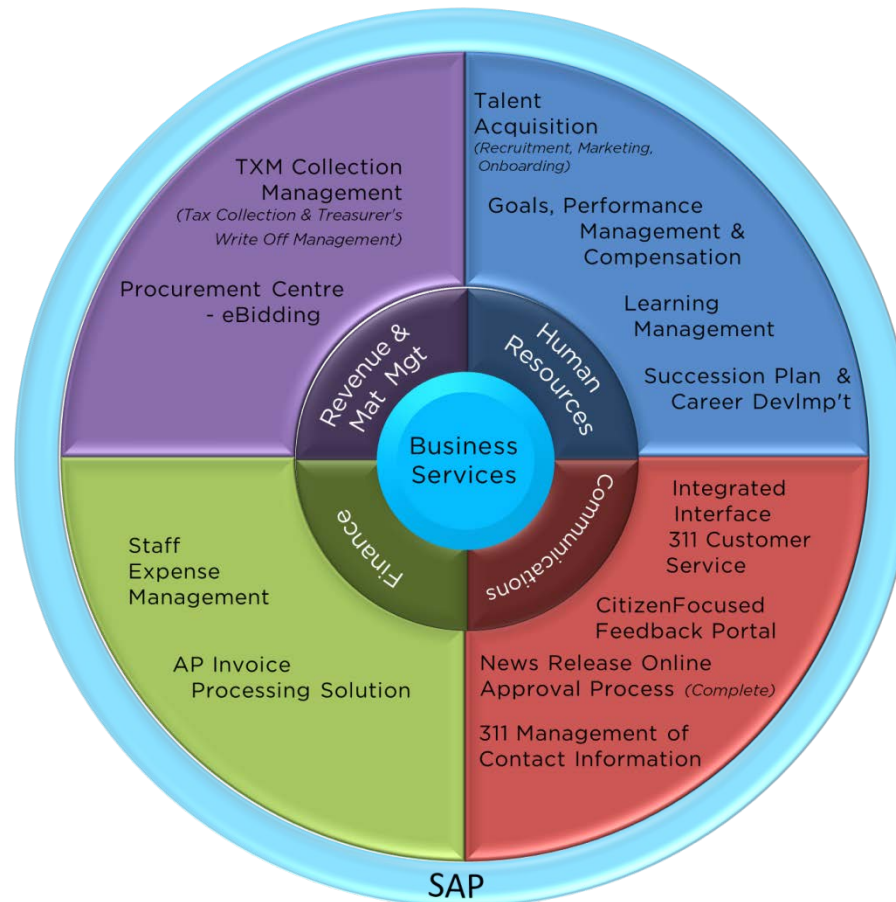
- Partnerships with senior levels of government to secure funding for environmental sustainability projects such as the Port Credit Harbour Marina, Inspiration Lakeview and the Mississauga Cycling Master Plan help green our city
- Financial monitoring of overhead costs ensures efficiency goals are achieved such as the integration of billings for utilities with the supplier, the City's energy management system and the City's financial payment processing system
- Online services such as e-Bidding will improve the submission and receipt of bids and e-Evaluation with enable the City to evaluate the bids electronically which will make the entire process more efficient
- Partnership with the Municipal Property Assessment Corporation (MPAC) to exchange information between our systems
- Maximizing the use of technology is a key objective of the Communications Division in its efforts to support a green, environmentally sustainable communications approach for the City
- The Human Resources Division strives to maximize the use of technology and automation of business processes in its efforts to support a green, environmentally sustainable workplace



Transforming our Business with Technology

Information Technology is playing a significant role in transforming all City business. Technology-based changes within Business Services help all business areas: the benefits of the information technology innovations we make here often have a multiplier effect throughout the entire Corporation.

The graphic below summarizes the major highlights from the Information Technology Roadmap for Business Services.



Maintaining Our Infrastructure

Finance assists all City service areas to maintain tangible capital assets with a net book value of over \$8 billion through:

- Capital budget prioritization that ensures lifecycle projects receive adequate funding
- Establishment of a corporate asset management plan that defines lifecycle requirements
- Long range financial planning to address the funding needs of aging infrastructure

Finance's investment in financial systems is worth \$9.3 million, with continuous requirements to upgrade and maintain a variety of modules such as annual payroll income tax table updates. We have engaged the City's Information Technology Division and external consultants to road map a major upgrade of our financial systems. This upgrade will change the underlying data architecture of our financial systems and provide a much more user-friendly environment for finance staff and reporting.

Communications manages many of the corporate channels, tools and guidelines that enable the City of Mississauga to effectively communicate with its key audiences, both internal and external. Our infrastructure also consists of specialized software technology.

Management and Content Curation of Corporate Channels

- City Website
- Facebook
- Twitter
- LinkedIn
- YouTube

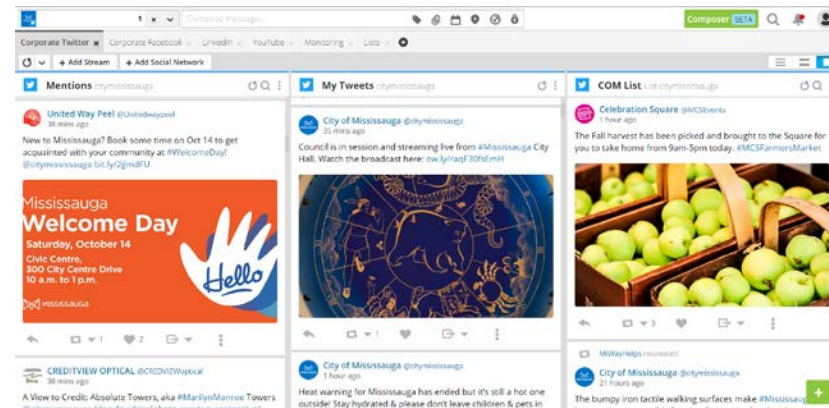
Overseeing of Divisional Channels

- 21 Facebook accounts

- 15 Twitter accounts
- 4 Instagram accounts
- 1 LinkedIn account

Specialized Software Technology

Specialized software tools help Communications manage and monitor traditional, digital and social media allowing for more effective and targeted distribution of information. The Division maintains **survey software** that allows City Departments to determine citizen sentiment and opinions on a number of City related topics. **Media monitoring software** enables the City to monitor, report and analyze City news coverage. City-wide **customer service relationship management (CRM)** and **knowledge base (KB) technology** will support effective and efficient customer service operations. It will result in measurable outcomes such as shorter wait time for citizens, faster and more comprehensive knowledge base search, improved caller satisfaction, and reduced staff training time.



Social Media monitoring report excerpt

Managing Our Human Resources

Good workplaces are satisfying to the employees and productive for the enterprise. In Business Services, all groups strive to inspire our highly skilled and talented workforces, supporting and empowering them to accomplish their goals.

Our Structure

Business Services includes four divisions (HR, Finance, Communications, Revenue and Materiel Management) and one business section (Corporate Performance and Innovation), all within the Corporate Services Department.

Our Talent

Staff in Business Services have a variety of skills, education and certifications. A high proportion of staff have post-secondary education. Some of the types of certifications and affiliations held by staff include:

- Human Resources Professional Association Certification
- Ontario Occupational Health Nurse Certification
- International Coaching Federation Certification
- Prosci Change Management Certification
- Ontario Municipal Human Resources Association
- Certified Health and Safety Consultant - Canadian Society of Safety Engineering
- Lean Certification
- Certified Municipal Manager
- Chartered Professional Accountants (CPA)
- Masters of Business Administration (MBA)
- Canadian Payroll Association (CPA)
- Municipal Finance Officers Association (MFOA)

- Association of Municipal Clerks and Treasurers (AMCTO)
- Government Finance Officers Association (GFOA) Project Management Institute
- International Association of Business Communicators (IABC)
- Association of Registered Graphic Designers (RGD)
- International Association of Facilitators of North America
- Strategic Initiatives Roundtable
- Lean in the Public Sector
- Certified Municipal Tax Professional (CMTP)
- Supply Chain Management Professional (SCMP)
- Certified Public Procurement Officer (CPPO)
- Certified Professional Public Buyer (CPPB)

Succession planning and talent growth development initiatives take place in all areas of Business Services. Staff are offered rotation opportunities to broaden their skills and experience. There are several in-house training opportunities offered to staff, facilitated by internal subject matter experts and external vendors. Appropriate continuing education, external seminars and conferences are also made available to staff.

Critical Roles/Functions to Achieve Business Goals

HR functions that are critical to achieving the Division's business goals are HR Technology, Learning and Organizational Development, Labour and Employee Relations, Wellness, Recruitment and Compensation. These functions are critical as they align with the strategic priorities and initiatives in the People Strategy and support HR's business model.

To ensure that HR Consultants within the Strategic Business Partnership possess the competencies relating to the critical functions and effectively broker the services of staff in the

Centres of Expertise, in 2017 we have developed competencies for the HR Consultants and are putting together development plans in relation to those competencies where gaps have been identified.

Critical roles and functions within Finance include accounting, treasury, payroll, policy management, business planning and budgeting, public financial reporting, long term financial planning, controllership, and strategic advising.

In Communications, critical roles and functions include strategic communications planning, marketing, graphic design, a variety of digital media roles, customer service and research based marketing and communications.

Corporate Performance and Innovation's critical roles and functions include management consulting, business innovation expertise, corporate policy expertise, and Lean research, analysis and training.

The work of Revenue and Materiel Management requires critical roles and functions to be performed such as tax ratio and tax rate determination; bill issuing; collection services; counter, cashier and welcome desk service; tax rebate processing; procurement policy, strategy and plan development and implementation; and, appeals processing.

Talent Needs

All groups in Business Services have a focus on supporting their staff to develop Lean expertise.

In all groups, significant numbers of experienced and knowledgeable staff will be eligible for retirement in the coming few years. The current work of active succession planning, labour market research, and documentation of operating procedures will assist staff who are taking on new roles, whether from within or outside the Corporation, to become effective quickly. Business Services had 18 people enrolled in the leadership succession planning program at December 31, 2016.

HR developed the Workplace Diversity and Inclusion Strategy in 2016. The Division currently does not have the resources or the expertise to operationalize the recommended actions from the strategy. To ensure the Division has the resources and expertise to co-ordinate the effective implementation of the Strategy, Budget Request # 4034 includes one new staff request (2019): Diversity and Inclusion Co-ordinator.

The 2018 budget introduces one staff complement in Finance, fully funded through the federal gas tax program, to support the development of asset management planning in conjunction with anticipated legislative change requirements. See Budget Request # 4095 for further details.

In Communications, when needed, recruitment of new talent from new graduate pools from various communications programs is considered. Immediate talent needs for 2018 include two Capital tax funded positions to lead the Customer Service Technology Review and Feasibility Study.

No new staff are proposed at this time in Corporate Performance and Innovation or Revenue and Materiel Management.



The Corporate Performance and Innovation Team

Proposed Full Time Equivalent Staffing

Proposed Full Time Equivalent Staffing Distribution by Program

Program	2017	2018	2019	2020	2021
Human Resources	72.0	72.0	72.0	70.0	70.0
Finance	72.0	73.0	72.0	72.0	72.0
Communications	64.2	65.2	62.2	60.2	60.2
Corporate Performance and Innovation	13.4	13.4	13.4	13.4	13.4
Revenue & Materiel Management	67.8	65.8	63.8	63.8	60.8
Total Service Distribution	289.4	289.4	283.4	279.4	276.4

Note: Numbers may not balance due to rounding.

2018 FTE changes include:

Two (2) capital-funded positions in Communications: Project Business Manager and IT Project Leader. This is offset by one (1) capital-funded position removed in 2018.

One (1) Asset Management Project Lead in Finance.

Two (2) positions removed in Central Stores.

2019-2021

The declining trend is due to capital contract positions expiring.

Proposed Operating Budget

This part of the Business Plan sets out the financial resources required to deliver the proposed 2018-2021 Business Plan. Information is provided by major expenditure and revenue category as well as by program. The costs to maintain existing service levels and operationalize prior decisions are identified separately from proposed changes. The budget for 2017 was \$29.43 million and the proposed budget for 2018 is \$30.45 million.

Total Changes to Maintain Current Service Levels

The total increase required to maintain current service levels is \$946,000. The cost of \$867,000 reflects the increase in labour and other fringe benefits. Cost increase has remained minimal at \$79,000.

- Communications requested an amount of \$5,000 to increase purchase of City corporate promotional materials
- An increase of \$60,000 is targeted to support an increase in resident communications initiatives that have been identified as key 2018 City priorities
- Human Resources requires \$10,000 for staff development
- The remaining \$4,000 covers various operational expenses

Efficiencies and Cost Savings

Business Services has achieved a total of \$207,000 reduction in its overall budget, broken down as follows:

- Cost savings of \$9,000 in Communications. This savings consists of a reduction to temporary labour and internal supplies and printing
- A decrease of \$7,000 in the Finance budget due to a review of staff development costs where savings were recognized under subscriptions and seminars/workshops that are no longer required

- A reduction in CPI operational costs of \$3,000
- A total of \$188,000 savings in Central Stores which includes labour and other operating expenses

New Initiatives

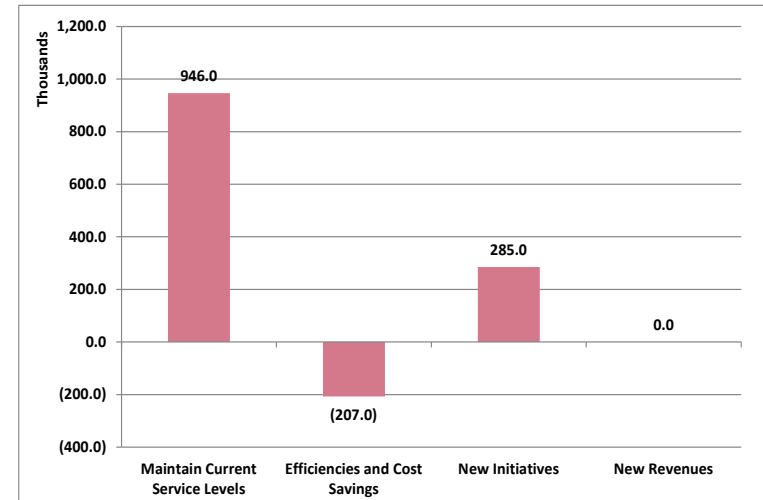
For 2018, the total amount for New Initiatives is \$285,000.

- BR 3980: Modernize Candidate Sourcing and Assessment Tools for Recruitment (2018) - Sourcing and assessment were identified in the Talent Acquisition Strategy as areas where the City lags compared to the overall public sector. Sourcing subscriptions and automated screening tools will enhance outreach and the quality of hires by improving objectivity in matching identified competence with candidate profiles (\$60,000)
- BR 4096: Enhanced Learning and Development Opportunities for Employees and Leaders (2018) - The "Develop" Strategic Driver from the approved Talent Management Strategy focuses on building talent at all levels in the organization. There has been no new investment in learning for 12 years despite increases in the number of employees and changes in the best practices for learning. As a result of increased demand for classes and the addition of more courses, Human Resources is requesting operating funds to invest in learning to allow for higher job satisfaction levels, lower employee turnover, and manage the transitions related to so many retirements (\$150,000)
- BR 4055: Digital Strategy - Measuring Customer Satisfaction (2018) – City-wide technology to measure the performance of the City's Web experience in meeting the need and expectations of our citizens (\$75,000)
- BR 2926: New Customer Relationship Management and Knowledge Base to Modernize Customer Service (2018) –

Involves implementing key recommendations from the Corporate Customer Service Strategy including a feasibility study for CRM and KB technology (\$0 operating impact in 2018 as the FTE is funded from the capital budget)

- BR 4095: Asset Management Project Lead (2018) - Finance will recruit an Asset Management Project Lead in early 2018 to assist with the development of anticipated legislation requirements. The costs associated with this new initiative are offset 100 per cent by new revenues through funding under the Federal Gas Tax program which supports and endorses asset management planning
- BR 4034: Diversity and Inclusion Co-ordinator (2019) - The Diversity and Inclusion Co-ordinator will be responsible for operationalizing the Strategy, implementing the 22 recommended actions and ensuring integration of diversity and inclusion initiatives throughout the organization

Proposed Changes to 2018 Net Operating Budget by Category (000's)



Operating Budget Details

The following table identifies the budgeted and forecasted operating expenditures and revenues for 2018-2021, as well as the 2017 Budget and 2016 Actuals by major program within the Service Area.

Proposed Budget by Program

Description	2016 Actuals (\$000's)	2017 Budget (\$000's)	2018 Proposed Budget (\$000's)	2019 Forecast (\$000's)	2020 Forecast (\$000's)	2021 Forecast (\$000's)
Expenditures to Deliver Current Services						
Human Resources	8,754	9,182	9,371	9,494	9,609	9,725
Finance	8,129	8,366	8,552	8,668	8,786	8,905
Communications	5,415	6,149	6,312	6,219	6,300	6,383
Corporate Performance and Innovation	1,815	1,775	1,817	1,840	1,864	1,888
Revenue, Materiel Management & Business Service	6,504	6,718	6,817	6,895	6,980	7,065
Total Expenditures	30,617	32,190	32,870	33,117	33,539	33,966
Revenues	(2,029)	(2,330)	(2,330)	(2,330)	(2,330)	(2,330)
Transfers From Reserves and Reserve Funds	(365)	(428)	(369)	(372)	(376)	(379)
New Initiatives and New Revenues			285	413	614	616
Proposed Net Budget Including New Initiatives & New Revenues	28,223	29,432	30,456	30,827	31,447	31,873
Expenditures Budget - Changes by Year			2%	1%	1%	1%
Proposed Net Budget - Changes by Year			3%	1%	2%	1%

Note: Numbers may not balance due to rounding.

Summary of Proposed Budget

The following table shows the proposed budget changes by description and category. Costs (labour, operational costs, facility, IT and support) and revenues are shown by category with the approved 2017 budget for comparison. The three columns to the far right of the table show the totals proposed for 2018 and their dollar and percentage changes over 2017.

Summary of Proposed 2018 Budget

Description	2017 Approved Budget (\$000's)	Maintain Current Service Levels	Efficiencies and Cost Savings	Annualized Prior Years Budget Decisions	Operating Impact of New Capital Projects	Proposed New Initiatives And Revenues	Special Purpose Levies	2018 Proposed Budget (\$000's)	\$ Change Over 2017	% Change Over 2017
Labour and Benefits	28,278	868	(165)	0	0	103	0	29,084	805	3%
Operational Costs	3,911	20	(42)	0	0	285	0	4,174	262	7%
Facility, IT and Support Costs	0	0	0	0	0	0	0	0	0	0%
Total Gross Expenditures	32,190	887	(207)	0	0	388	0	33,258	1,068	3%
Total Revenues	(2,758)	59	0	0	0	(103)	0	(2,802)	(44)	2%
Total Net Expenditure	29,432	946	(207)	0	0	285	0	30,456	1,024	3%

Note: Numbers may not balance due to rounding.

Summary of Proposed 2018 Budget and 2019 - 2021 Forecasts

Description	2016 Actuals (\$000's)	2017 Budget (\$000's)	2018 Proposed Budget (\$000's)	2019 Forecast (\$000's)	2020 Forecast (\$000's)	2021 Forecast (\$000's)
Labour and Benefits	27,308	28,278	29,084	29,462	29,885	30,315
Operational Costs	3,309	3,911	4,174	4,190	4,392	4,394
Facility, IT and Support Costs	0	0	0	0	0	0
Total Gross Expenditures	30,617	32,190	33,258	33,652	34,277	34,708
Total Revenues	(2,394)	(2,758)	(2,802)	(2,825)	(2,830)	(2,836)
Total Net Expenditure	28,223	29,432	30,456	30,827	31,447	31,873

Note: Numbers may not balance due to rounding.

Proposed Cost Increase Required to Maintain Current Service Levels

The following table provides detailed highlights of budget changes by major cost and revenue category. It identifies the net changes to maintain existing service levels, taking into account efficiencies, cost savings, and cost increases arising from prior year decisions.

Category	2017 Budget (\$000's)	2018 Proposed Budget (\$000's)	Change (\$000's)	Details (\$000's)
Labour and Benefits	28,278	28,981	702	Increase Reflects Labour Adjustments and Other Fringe Benefit Changes
Advertising & Promotions	316	319	3	Cost Increase in Promotional Materials
Communication Costs	520	518	(2)	Efficiencies and Cost Savings
Contractor & Professional Services	1,524	1,522	(2)	Operating Budget Request forwarded from 2016 to 2017 reversed in 2018 (\$60K) offset by Communications Support Costs \$60K; Efficiencies and Cost Savings (\$2K)
Equipment Costs & Maintenance Agreements	205	203	(2)	Efficiencies and Cost Savings
Finance Other	86	94	8	Recovery Adjustment for Investment Group
Materials, Supplies & Other Services	515	500	(15)	Efficiencies and Cost Savings
Occupancy & City Costs	280	274	(6)	Lower Utilities Consumption in Central Stores
Staff Development	344	348	4	Additional Funding Requirement in HR offset by Savings in Finance & CPI
Transfers To Reserves and Reserve Funds	73	73	0	
Transportation Costs	48	38	(11)	Efficiencies and Cost Savings
Subtotal - Other Operating	3,911	3,889	(23)	
Total Revenues	(2,330)	(2,330)	0	
Transfers From Reserves and Reserve Funds	(428)	(369)	59	Operating Budget Request forwarded from 2016 to 2017 reversed in 2018 under Professional Services
Subtotal - Revenues	(2,758)	(2,699)	59	
Total	29,432	30,171	739	

Note: Numbers may not balance due to rounding.

Proposed New Initiatives and New Revenues

This table presents the costs by Budget Request number (BR#) for proposed new initiatives. Detailed descriptions of each Request can be found on the pages following the table.

Description	BR #	2018 FTE Impact	2018 Proposed Budget (\$000's)	2019 Forecast (\$000's)	2020 Forecast (\$000's)	2021 Forecast (\$000's)	2018 to 2021 FTE Impact	2018 to 2021 Capital (\$000's)
New Initiatives								
New Customer Relationship Management System and Knowledge Base to Modernize Customer Service	2926	2.0	0	0	200	200	0.0	1,927
Modernize Candidate Sourcing and Assessment Tools for Recruitment	3980	0.0	60	60	60	60	0.0	50
Diversity and Inclusion Coordinator	4034	0.0	0	128	129	131	1.0	0
Digital Strategy - Measuring Customer Satisfaction	4055	0.0	75	75	75	75	0.0	0
Asset Management (AM) Project Lead	4095	1.0	0	0	0	0	1.0	0
Enhance Learning and Development Opportunities for Employees and Leaders	4096	0.0	150	150	150	150	0.0	0
Total New Initiatives		3.0	285	413	614	616	0	1,977
Total New Initiatives and New Revenues		3.0	285	413	614	616	2.0	1,977

Note: Numbers may not balance due to rounding. Amounts are net.

The two (2) FTEs for BR 2926 are capital funded.

The Asset Management Project Lead is funded from Federal Gas Tax.

Proposed Initiative

New Customer Relationship Management System and Knowledge Base to Modernize Customer Service

Department

Corporate Services Department

Service Area

Business Services

Required Annual Operating Investment

Impacts (\$000s)	2018	2019	2020	2021
Gross Expenditures	0.0	0.0	200.0	200.0
Reserves & Reserve Funds	0.0	0.0	0.0	0.0
User Fees & Other Revenues	0.0	0.0	0.0	0.0
Tax Levy Requirements	0.0	0.0	200.0	200.0
* Net Change in \$		0.0	200.0	0.0
FTEs	2.0	2.0	0.0	0.0

**In each year, all values are cumulative, not incremental.*

Required Capital Investment

Total Capital (\$000s)	2017 & Prior	2018	2019	2020	2021 & Beyond
Expenditures	0.0	670.8	1,255.8	0.0	0.0

Why Staff Recommend this Initiative

Co-ordinated and consistent service delivery requires the ability to track requests and provide status updates through to their completion. To provide these capabilities, a customer relationship management (CRM) system is required. A CRM would improve interactions, provide new features to customers and improve the overall customer experience. A centralized Knowledge Base would allow for greater ease of maintenance of information and ensure residents always receive the most accurate information.

Details of Service Change

A CRM solution would greatly improve the City's customer service capabilities providing more options to self-serve and track the status of requests. The solution will:

- Allow creation of customer accounts
- Enable more web self-service
- Provide tracking numbers to track progress
- Send notification messages
- Produce improved metrics

Creating one knowledge base would allow all City staff to access and provide the most accurate and current information to customers across all channels. Currently there are three separate knowledge bases, with limited staff access. Leading practice recommends a single common source for information, documents and operating procedures to establish one 'version of the truth'.

Implementing a single sign-on for 311 agents would improve operational efficiency in the following ways:

- Simplify the login process by eliminating the need to manually enter credentials into 12 separate applications
- Boost 311 agent productivity and enable them to be ready quicker to handle calls
- Reduce Help Desk support to manage and reset passwords

Together, these enhancements provide the foundation to respond to customer expectations for accurate, timely and responsive service delivery.

Two Capital funded FTEs (one IT Project Leader for 18 months and one Business Advisor for two years) will manage the project with an external vendor being retained to complete a feasibility study in 2018. Capital funding in 2019 will be dedicated to implementation efforts.

Service Impact

Modernizing the technological infrastructure for customer service delivery will significantly improve customer experience and result in a number of internal and external benefits.

A new CRM solution will allow staff to have an enterprise view of the customer, providing greater insight into the needs of different customer segments. This will allow the City to better understand the particular preferences and requirements for various segments and enable continuous improvement in customer service delivery. The one knowledge base will improve the quality of information and the effort required to manage and maintain information – by reducing duplication and inconsistencies in the information.

Customers are likely to experience higher satisfaction by reducing the 'customer effort' and improving the ease of doing business with the City. They can also be more confident that they will receive more current, accurate and consistent information from the City as a result of the centralized knowledge base as the 'single version of the truth'. Capital funding in 2018 will be to carry out feasibility studies for both solutions, with 2019 capital funding dedicated to implementation efforts.

Proposed Initiative

Modernize Candidate Sourcing and
Assessment Tools for Recruitment

Department

Corporate Services Department

Service Area

Business Services

Required Annual Operating Investment

Impacts (\$000s)	2018	2019	2020	2021
Gross Expenditures	60.0	60.0	60.0	60.0
Reserves & Reserve Funds	0.0	0.0	0.0	0.0
User Fees & Other Revenues	0.0	0.0	0.0	0.0
Tax Levy Requirements	60.0	60.0	60.0	60.0
* Net Change in \$		0.0	0.0	0.0
FTEs	0.0	0.0	0.0	0.0

**In each year, all values are cumulative, not incremental.*

Required Capital Investment

Total Capital (\$000s)	2017 & Prior	2018	2019	2020	2021 & Beyond
Expenditures	0.0	50.0	0.0	0.0	0.0

Why Staff Recommend this Initiative

Sourcing and assessment were identified in the Talent Acquisition Strategy as areas in which the City is lagging compared to the public sector overall. Sourcing subscriptions and automated screening tools will enhance outreach especially to equity seeking groups as well as the quality of hires because they assist in improving objectivity by matching identified competence with candidate profiles. They save time and enhance a hiring manager's ability to assess candidate's skills and behaviours.

Details of Service Change

Current sourcing and assessment tools are limited to a subscription to Equitek (a subscription for outreach to equity seeking groups), Predictive Index (an on line behavioral assessment tool) and LinkedIn (a subscription for recruiter tools to search out passive candidates and post job opportunities) in the amount of \$121,000 annually. As turnover rates and the percentage of staff eligible to retire continually increase the City must become more intentional in its sourcing and assessment efforts to ensure the right candidates are hired at the right time with the right skills. With advances in technology there are a variety of tools available to more effectively and efficiently source and assess candidates including outreach subscriptions, on line assessments, behavioural testing and analysis tools, social recruitment networks and video interviewing technology. These tools will significantly enhance hiring manager's ability to source and assess candidates to ensure they have the skills and behaviours required to successfully perform the work that is required in their role.

Service Impact

In order to modernize candidate sourcing and assessment tools Human Resources is requesting \$60,000 annually to purchase subscriptions and/or licenses to a variety of sourcing tools such as outreach subscriptions, on line assessments, behavioural testing and analysis tools, social recruitment networks and video interviewing technology, and one time capital cost of \$50,000 for integration with SuccessFactors (SAP Talent Management software).

Proposed Initiative

Diversity and Inclusion
Co-ordinator

Department

Corporate Services Department

Service Area

Business Services

Required Annual Operating Investment

Impacts (\$000s)	2018	2019	2020	2021
Gross Expenditures	0.0	127.6	129.4	131.1
Reserves & Reserve Funds	0.0	0.0	0.0	0.0
User Fees & Other Revenues	0.0	0.0	0.0	0.0
Tax Levy Requirements	0.0	127.6	129.4	131.1
* Net Change in \$		127.6	1.8	1.8
FTEs	0.0	1.0	1.0	1.0

**In each year, all values are cumulative, not incremental.*

Required Capital Investment

Total Capital (\$000s)	2017 & Prior	2018	2019	2020	2021 & Beyond
Expenditures	0.0	0.0	0.0	0.0	0.0

Why Staff Recommend this Initiative

Best practice research indicates that having a dedicated resource to drive the rollout of a strategy is essential to ensure success and sustainment. The cities of Toronto, Markham and the Region of Peel all have a dedicated resource. Without this resource many strategies quickly fail and employees perceive that the organization is not truly committed. Not dedicating resources can actually exacerbate feelings of disengagement for employees who took the risk to contribute to the strategy.

Details of Service Change

The Diversity and Inclusion Co-ordinator will be responsible for operationalizing the Strategy, implementing the 22 recommended actions and ensuring integration of diversity and inclusion initiatives throughout the organization. Specific duties would include ensuring that employment legislation and the diversity and inclusion lens are applied to all policies and procedures; managing communications related to diversity and inclusion; managing rollout of training initiatives; integration of diversity and inclusion content into other learning programs and developing a scorecard to measure and report on progress on all diversity and inclusion initiatives.

Service Impact

The expected outcome of this strategy is to create a respectful and supportive workplace that fosters a culture of diversity and inclusion, and to attract, retain, and develop a talented diverse workforce which broadly reflects the communities and citizens we serve. Our goal is to create an organization which leverages diverse talents and ways of thinking to create innovative programs and services that meet the diverse needs of our citizens.

Proposed Initiative

Digital Strategy - Measuring
Customer Satisfaction

Department

Corporate Services Department

Service Area

Business Services

Required Annual Operating Investment

Impacts (\$000s)	2018	2019	2020	2021
Gross Expenditures	75.0	75.0	75.0	75.0
Reserves & Reserve Funds	0.0	0.0	0.0	0.0
User Fees & Other Revenues	0.0	0.0	0.0	0.0
Tax Levy Requirements	75.0	75.0	75.0	75.0
* Net Change in \$		0.0	0.0	0.0
FTEs	0.0	0.0	0.0	0.0

**In each year, all values are cumulative, not incremental.*

Required Capital Investment

Total Capital (\$000s)	2017 & Prior	2018	2019	2020	2021 & Beyond
Expenditures	0.0	0.0	0.0	0.0	0.0

Why Staff Recommend this Initiative

To modernize the City's approach to managing our website and digital channels, online performance indicators need to be as accurate and reliable as the financial, operational, and other metrics the City uses to make key business decisions. This program will measure the "Voice of the Customer" to drive the decisions of City digital staff, which is a key recommendation in the governance model outlined in the Communications Digital Strategy.

Details of Service Change

This initiative involves the procurement of an online survey tool, and value added services for regularly monitoring, reporting and interpreting the results. The data collected will provide a measurement of 'the voice of the customer' by intercepting people during their online interactions with the City. It is immeasurably more valuable to obtain this information while the customer is interacting with the City on a digital channel than to obtain it by other surveying options that would require them to recall past behaviour and impressions.

The data will be analyzed to provide a satisfaction score that will be measured and benchmarked against other public sector organizations. It will allow the City to measure progress over time and establish trends as well as prescribe specific high impact actions for improving our score.

Service Impact

Overall, the benefits of implementing this initiative include:

- Building greater value in the City's measurement of online channels
- Aligning the City's digital workforce around decisions that are customer-centric
- Improving websites in a way that is meaningful for the City's customers

High customer satisfaction is linked to higher business performance on transactions, commerce, and channel shift from telephones to online. This initiative builds on the past City pilot investment in software. The results of this pilot to date have provided invaluable insight and helped establish a Corporate baseline for what customers experience today across the City's digital channels. A reinvestment will allow the City to measure and report on progress as it continues to modernize its approach to public facing websites.

Proposed Initiative

Asset Management (AM) Project
Lead

Department

Corporate Services Department

Service Area

Business Services

Required Annual Operating Investment

Impacts (\$000s)	2018	2019	2020	2021
Gross Expenditures	102.9	122.5	124.3	126.1
Reserves & Reserve Funds	102.9	122.5	124.3	126.1
User Fees & Other Revenues	0.0	0.0	0.0	0.0
Tax Levy Requirements	0.0	0.0	0.0	0.0
* Net Change in \$		0.0	0.0	0.0
FTEs	1.0	1.0	1.0	1.0

**In each year, all values are cumulative, not incremental.*

Required Capital Investment

Total Capital (\$000s)	2017 & Prior	2018	2019	2020	2021 & Beyond
Expenditures	0.0	0.0	0.0	0.0	0.0

Why Staff Recommend this Initiative

Anticipated amendments to existing legislation will require a strategic asset management policy and a framework for the development of asset management plans, identifying how these align with municipal plans and long term financial plans and budgets, taking into consideration Council's and the public's feedback. Development Charge (DC) legislation and Gas Tax agreements require detailed AM plans.

Details of Service Change

Recent benchmarking with other municipalities has identified centralized co-ordination of asset management as a best practice. There is no available resource in Finance for this role. One full-time permanent position is being requested, beginning in March 2018. The addition of this position would begin the process of (1) ensuring prioritization of state of good repair projects between departments; (2) establishing lifecycle replacement funding requirements, and integrating these requirements into the long range financial plan; (3) providing capacity within Finance to ensure (anticipated) legislative requirements can be met and appropriate responses to provincial and federal infrastructure funding opportunities. The position is being funded through Federal Gas Tax, as this funding source allows for Asset Management planning implementation.

Service Impact

The incumbent will work closely with departmental asset-management subject matter experts (SMEs) and ensure that asset management information is fully co-ordinated. This in turn will allow the City's limited infrastructure replacement dollars to be focused where they are needed most, and ensure the City is armed with appropriate information to plan for its infrastructure replacement dollars into the future. The work performed in this position will ensure compliance with legislative requirements and ensure the City maximizes any potential federal and provincial funding.

Proposed Initiative

Enhance Learning and Development Opportunities for Employees and Leaders

Department

Corporate Services Department

Service Area

Business Services

Required Annual Operating Investment

Impacts (\$000s)	2018	2019	2020	2021
Gross Expenditures	150.0	150.0	150.0	150.0
Reserves & Reserve Funds	0.0	0.0	0.0	0.0
User Fees & Other Revenues	0.0	0.0	0.0	0.0
Tax Levy Requirements	150.0	150.0	150.0	150.0
* Net Change in \$		0.0	0.0	0.0
FTEs	0.0	0.0	0.0	0.0

**In each year, all values are cumulative, not incremental.*

Required Capital Investment

Total Capital (\$000s)	2017 & Prior	2018	2019	2020	2021 & Beyond
Expenditures	0.0	0.0	0.0	0.0	0.0

Why Staff Recommend this Initiative

The "Develop" Strategic Driver from the approved Talent Management Strategy focuses on building talent at all levels in the organization by implementing effective programs and practices. However, there has been no new investment in learning for 12 years despite increases in the number of employees and changes in the best practices of learning. As a result of increased demand for classes and the addition of more courses, Human Resources is requesting operating funds to enhance learning.

Details of Service Change

In 2018, Human Resources is offering new courses for employees and leaders, begins mandatory learning for High Potential (HiPo) employees in the Leadership Succession Planning program and introduces intact team learning for the Extended Leadership Team (ExLT). These new offerings align with the following corporate initiatives:

- Recommendations from the Business Planning Committee for improving business acumen
- Master plans in Communications and Human Resources
- Approved recommendations from Leadership Succession Planning program

Currently, there is a \$90,000 annual corporate budget to train 4,000 employees and 500 leaders at an investment of only \$11 per employee and \$90 per leader, well below the best practice benchmark of \$1,200 and \$2,000, respectively. Funds requested would increase the budget by \$55,000 providing classes for an additional 385 employees and leaders annually.

For HiPos there is a budget of \$33,100 established when there were 30 HiPos. There are now 178 HiPos with 185 projected by 2020. This represents an investment of \$186 per HiPo, well below the best practice benchmark of \$4,000 per HiPo. The requested funds would increase this budget by \$33,000 annually for four years ensuring each HiPo completes the mandatory learning.

There are no identified funds for intact team learning for ExLT. The best practice benchmark for learning for this group is \$4,000 per leader. The requested funds of \$62,000 would provide for two learning initiatives annually.

Service Impact

Human Resources is requesting funds in the amount of \$150,000 in operating funds required for employee, leader, HiPo and ExLT learning in 2018. These funds will pay for external facilitator costs and learning materials.

The investment in learning drives significant benefits for the City including improving employees' competency, skills and performance. This translates into improved customer service, decision making and resiliency. Best practice research proves that organizations that invest in learning have higher job satisfaction and morale levels and lower employee turnover. An investment in learning is also a strong motivator for attracting new talent to the City which is becoming increasingly challenging with current and projected demographic and labour market trends. These investments move the City closer to the best practice benchmark for all employees i.e., employees, leaders, HiPos and ExLT. This will assist in the transfer of knowledge and expertise as we continue to experience so many retirements.

Proposed Capital Budget

This section summarizes the forecast 10 year capital requirements for this service. The following table presents the forecast by major program. The next table summarizes the sources of financing for the capital forecast.

Proposed 2018-2027 Capital Budget by Program

Program Expenditures	2018 Proposed Budget (\$000's)	2019 Forecast (\$000's)	2020 Forecast (\$000's)	2021 Forecast (\$000's)	2022-2027 Forecast (\$000's)	Total 2018-2027 (\$000's)
Administration	1,396	1,406	150	260	860	4,072
Total	1,396	1,406	150	260	860	4,072

Note: Numbers may not balance due to rounding. Numbers are gross.

Proposed 2018-2027 Capital Forecast Highlights include the following:

The City's Customer Service Strategy project is requesting a budget of \$2.4 million cash flow over a four-year period. The project will provide measurable outcomes such as shorter wait times for citizens, faster and more comprehensive knowledge base searches, improved resident caller satisfaction, and reduced City staff training time, via modernized customer service operations and technology. The enterprise-wide customer service strategy will have a positive impact on the City's reputation and future customer interactions. The request is detailed in BR2926 – New Customer Relationship Management System and Knowledge Base to Modernize Customer Service.

The DC Background Studies require a budget of \$1 million for this 10-year period covering three studies. The study occurs every five years and is a legislated requirement.

Proposed 2018-2027 Capital Budget by Funding Source

The following table provides the funding sources proposed to fund the capital portion of the proposed 2018-2021 Business Plan and 2018 Budget and the consolidated forecast for 2022-2027.

Funding	2018 Proposed Budget (\$000's)	2019 Forecast (\$000's)	2020 Forecast (\$000's)	2021 Forecast (\$000's)	2022-2027 Forecast (\$000's)	Total 2018-2027 (\$000's)
Tax/Debt	1,026	1,316	150	130	60	2,682
Development Charges	270	90	0	0	540	900
Gas Tax	0	0	0	0	0	0
Other Reserves & Reserve Funds	100	0	0	130	260	490
Total	1,396	1,406	150	260	860	4,072

Note: Numbers may not balance due to rounding.

Proposed 2018 Capital Budget Detail

The following tables provide a detailed listing of proposed capital projects for 2018.

Program: Administration

Project Number	Project Name	Gross Cost (\$000's)	Recovery (\$000's)	Net Cost (\$000's)	Funding Source
CPB 006359	Social Procurement Policy implementation	50	0	50	Tax/Debt
CPB006023	Integration of Candidate Sourcing and Assessment	50	0	50	Tax/Debt
CPB006351	Energy Management and A/P Interface	75	0	75	Tax/Debt
CPB006352	Customer Service Strategy	821	0	821	Tax/Debt
CPB006360	DC Background Study - Consulting	100	0	100	Development Charges, Tax/Debt
CPBS00004	DC Background Study 2017	200	0	200	Development Charges, Tax/Debt
CPBS00020	Employee Survey-2018	100	0	100	Other Reserves & Reserve Funds
Total		1,396	0	1,396	

Note: Numbers may not balance due to rounding.

Proposed 2019-2021 Capital Budget by Sub-Program

The following tables provide a listing of capital forecast by sub-program for 2019-2021.

Sub-Program	2019 Forecast (\$000's)	2020 Forecast (\$000's)	2021 Forecast (\$000's)
Administration			
Business Services Applications	0	0	0
Business Services DC Studies	100	0	0
Business Services Other	1,306	150	260
Subtotal	1,406	150	260
Total Expenditures	1,406	150	260

Note: Numbers may not balance due to rounding. Numbers are net.