CITY OF BURLINGTON
2019 SERVICE DELIVERY REVIEWS

INITIAL BRIEFING FOR BURLINGTON COUNCIL – COMMITTEE OF THE WHOLE

SEPTEMBER 9TH 2019

PERFORMANCE CONCEPTS CONSULTING

DILLON CONSULTING

RECENT HISTORY

- Provincial Audit & Accountability Fund offers seed money for 3rd party Efficiency Reviews
- City Manager's Report CM-14-19 sets out a proposed work plan for 4 Service Reviews to be funded by Audit & Accountability Fund ($250k)
- Council endorses CM-14-19 recommended work plan
- Burlington Service Review proposal accepted by Province & the Performance Concepts/Dillon review team retained by City Manager/Staff team

BURLINGTON'S EVOLVING SERVICE DELIVERY REVIEW MODEL

- Annual service delivery reviews linked to strategic plan priorities & annual budget process…an expression of Burlington's commitment to taxpayers re. continuous improvement
- Rotating reviews across City services/business units according to a multi-year work plan extending across each term of Council
- Focus on value-for-money/cost savings/efficient processes & sustainable service levels
- Provincial seed money in 2019 can leverage the development of the City's permanent service delivery review model
  - Aligning Council's strategic planning priorities with annual budget cycle
  - Staff capacity building via LEAN thinking/training

PROVINCIAL GOVERNMENT 2019 SEED MONEY FOR MUNICIPAL EFFICIENCY REVIEWS

- Service delivery reviews (draft) to be completed by mid-December and posted on City website…reporting to Province will include an estimated cost savings ROI
- Burlington portfolio of reviews:
  1. Development Approvals Process (Zoning/Grading Clearances + Minor Variances + Tree Removal)
  2. Winter Control (Roads + Sidewalks)
  3. Green Fleet
  4. Leaf curbside non-bagged pick-up (Annual Fall program)

SERVICE DELIVERY REVIEWS 101: BURLINGTON'S ROI

- Continuous Improvement ROI
  - ✓ Process streamlining/doing it better. Leveraging process improvement with data/technology tools.
- Service Planning/Reporting ROI
  - ✓ Establishing quantitative performance targets that can drive actual performance results
- Rationalized Service Levels ROI
  - ✓ Measurement derived sustainable service levels that align with budget process + strategic planning.
- Cost Control ROI
  - ✓ Bending the cost curve. Necessary to ask/answer the *core service* question of "should we actually be in the business of X?"

PROPOSED PROJECT MANAGEMENT MODEL

City Manager (Strategic Direction)

P. Concepts/Dillon Team ⟷ **City Project Team**

Consulting Team Coordinator – Todd MacDonald

- DAP Review Lead – **Todd MacDonald**
- Winter Control Review Lead – **Todd MacDonald**
- Fleet Review Lead – **Darla Campbell**
- Leaf Curbside Review Lead – **Betsy Varghese**
- Public Consultation Lead – **Karla Kolli**
- LEAN Training – **Leading Edge Group**

Project Coordinator – Helen Walihura

- Lead (DAP) – **Brynn Nheiley**
- Lead (Winter Control) – **Mark Adam**
- Lead (Fleet) – **Jessica Wesolowski**
- Lead (Leaf Curbside) – **Mark Adam**
- Lead (Public Consultation) – **Michelle Dwyer**
- Lead (LEAN Training) – **Stephanie Venimore / Mary Lou Tanner**

PERFORMANCE CONCEPTS/DILLON TEAM

Overall Project Management (4 Reviews)

P. Concepts President Todd MacDonald

	P. Concepts	Dillon
DAP Review	President Todd MacDonald	Partner Rory Baksh + Associate Michelle McCarthy
Winter Control Review	President Todd MacDonald + Senior Associate John Prno	Analyst Kaelee Oxford + Economist Conor Grieve
Leaf Collection Review		Associate Betsy Varghese + Economist Conor Grieve
Fleet Review	Senior Associate John Prno	Associate Darla Campbell + Associate Kathryn Palmer Economist Conor Grieve

Public & Stakeholder Engagement (4 Reviews)

Dillon Partner Karla Kolli

BROAD BASED EXPERIENCE & QUALIFICATIONS

- ***The Performance Concepts/Dillon team has delivered approximately 15 Municipal service delivery reviews together since 2006***

* **Since 2001 Performance Concepts has executed an additional 100+ municipal service delivery reviews across Ontario/Canada**

DAP Reviews	RPM Type Services (Varying mix of Roads/Winter Control, Parks/Sports Field, Arenas, Curbside Collection, Fleet)
Ottawa	Niagara Region
Guelph	Kitchener
Oakville	Waterloo Region
Halton Region	Vaughan (current)
Brant	Guelph (SWM & Transit)
Niagara Region & Niagara Falls	Brant
Muskoka	
Yellowknife & Whitehorse	

INVENTORY OF WINTER CONTROL ASSIGNMENTS

Performance Concepts

- Ontario Centre for Municipal Best Practices (OCMBP) 2002-2008
  - Now known as Ontario Municipal Knowledge Network
  - 15 Ontario municipal case studies re. Road Maintenance & Winter Control
  - Used MPMP & FIR data to conduct analyses
  - Identified specific Winter Control practices/techniques around shift/deployment models, salt management, direct versus contract resources, contract pricing

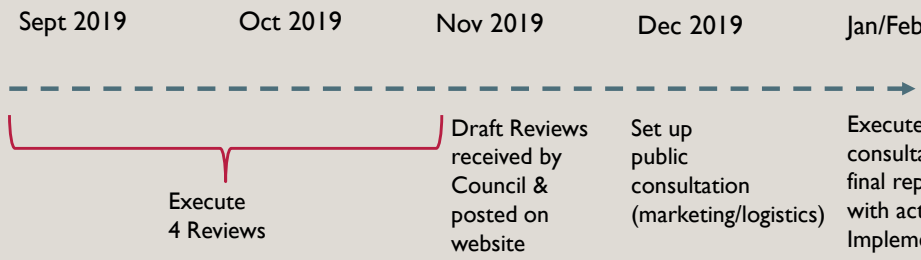
Dillon + Performance Concepts

- Niagara Region (2017) in-depth review of winter event response profiles, critique of municipal winter plan, optimized route configurations, modified service levels, refined staffing model to reduce OT, developed key performance indicators, evaluated equipment/fleet configurations, risk management based review of contracts pricing
  - Saved estimated $500k in year 1 of implemented recommendations
- Kitchener (2016) + Brant (2019) were successfully execute in depth reviews addressing similar performance factors noted above in Niagara Review

PROVEN METHODOLOGY FOR EVIDENCE-BASED SERVICE DELIVERY REVIEWS

- **Consistently applied methodology/deliverables across the 3 major Burlington reviews (scaled down for Curbside Leaf)**
  1. Assemble data driven ***Situation Analysis performance profiles***
     - Current service levels, delivery models/processes, cost/revenue trends, resourcing adequacy
  2. Execute ***Facilitated internal City business unit consultations*** exploring "As Is" versus "As Should Be" performance factors (linked to above Situation Analysis data driven profiles)
  3. ***Undertake*** rapid ***Peer municipality benchmarking scans*** (focused on specific identified service delivery improvement issues/opportunities)
  4. Build ***Draft Service Delivery Improvement Action Plans (Received by Council & posted on website)***
  5. ***Design/execute facilitated public/stakeholder consultations*** exploring "As Is" versus "As Should Be" service delivery models & cost/performance impacts
  6. ***Stress Test & Finalize*** the draft Service Delivery Improvement Action Plans (4) with City staff project team/expert staff
  7. ***Present Finalized Reviews featuring Efficiency Action Plans to Council*** – Emphasis on Implementation via trained City teams
- **Q1 2020…advise City re. "Go Forward" annual service delivery review model for Burlington (integrated with Strat Plan + annual Budget process)**

OVERALL PROJECT EXECUTION PATHWAY



Project Critical Path

DAP Review

* Apply LEAN thinking/tools as a "pilot run" for future Service Reviews in 2020 & beyond

	August	September				October				November				December		January			
	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19
Project Kick-off Session - Confirming Budget+ Timeframes + Methodology + Deliverables																			
Information Transfer: Data profiles as per already submitted AMANDA requests + Tree Removal permit data																			
Current Situation Analysis: Staff resources versus volumes, "As Is" versus "As Should Be" Mapped Processes, Processing timeframes trends, Cost recovery performance etc.																			
Peer Municipal Benchmarking Scan - Investigate alternative processes & compare resourcing levels versus volumes etc.																			
Semi-structured Interviews + Facilitated LEAN Working Sessions with City Staff Overseeing/Delivering Site Plan, Zoning Clearances, Grading Clearances,Tree Removal & Building Permits																			
Develop "As Should Be" Draft Findings & Efficiency Recomendations																			
Stress Test Draft Findings & Efficiency Recommendations with City Staff/External Stakeholders Panel																			
Develop Change Management Implementation Plan - People/Processes/Technology																			
Submit Draft Report to City Manager + Council (Received & Sent Out for Public Consultation) + Post on website																			
Public/External Stakeholder DAP Performance Evaluation/Feedback (2 Facilitated Interactive Working Sessions)																			
Finalize Report & Submit to City Manager + Present Efficiency Review/Implementation Action Plan to Council																			

Project Critical Path

Winter Control Review

	September				October				November				December		January			
	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19
Project Kick-off Session - Confirming Budget+ Timeframes + Methodology + Deliverables																		
Information Transfer: Mapping of routes, 5-year data profile (Deployed City units, Deployed Contractor units, Straight-time hours, OT hours, Winter Event responses, Capital spending, operating spending, reserve fund in/outs). Council approved winter control plan.																		
Current Situation Analysis Snapshot: Examples as follows - Winter Event timeframe response actuals v targets. Materials spead rate actuals v targets. Operating budget v actuals. Overtime v straight time event response hours/costs. In-house v contract cost/results comparisons.																		
Peer Municipal Benchmarking Scan - core performance elements in standardized data collection profile/template using Mentimetre.com																		
Semi-structured Interviews + Facilitated Working Sessions with City Staff Overseeing/Delivering Winter Control. Also Contractor interviews.																		
Develop "As Should Be" Draft Findings & Efficiency Recomendations																		
Stress Test Draft Findings & Efficiency Recommendations with City Staff/External Stakeholders Panel																		
Develop Change Management Implementation Plan - People/Processes/Technology																		
Submit Draft Report to City Manager + Council (Received & Sent Out for Public Consultation) + Post on website																		
Public/External Stakeholder Winter Control Performance Evaluation/Feedback (2 Facilitated Interactive Working Sessions)																		
Finalize Report & Submit to City Manager + Present Efficiency Review/Implementation Action Plan to Council																		

Project Critical Path

Green Fleet Review

	August	September				October				November				December		January			
	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19
Project Kick-off Session - Confirming Timeframes + Deliverables																			
Information Transfer: "As Is" Process maps/Org charts/Business Plans, existing fleet telematics data, fleet / equipment inventory, etc.																			
Current Situation Analysis: Fleet Inventory, Vehicle and Equipment Usage, Replacement / Upgrading Schedules, Historic "Right-Sizing" Surveys																			
Peer Municipal Benchmarking Scan																			
Data Collection through Surveys, Semi-structured Interviews, Facilitated Working Sessions with City Departments (targeting Roads, Parks, and Forestry Departments) and City staff																			
Modeling/ Analysis of City's Fleet and Reduction Measures																			
Develop "As Should Be" Draft Findings & Recomendations																			
Stress Test Draft Findings & Recommendations with City Staff																			
Develop Change Management Implementation Plan - People/Processes/Technology																			
Submit Report & Present to City Manager + Council + External Stakeholders as Required																			
Public/External Stakeholder/Feedback																			
Finalize Report & Submit to City Manager + Present Efficiency Review/Implementation Action Plan to Council																			

Project Critical Path

Leaf Collection Review

	August	September				October				November				December		January			
	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19
Project Kick-off Session - Confirming Timeframes + Deliverables																			
Information Transfer: "As Is" Process Maps/Org charts/Business Plans/LOS/KPIs, Budgets etc.																			
Current Situation Analysis: Service Inputs for Annual Fall Collection Season: Labour,Equipment/Service Area/Level of Service/Actual vs Budget Performance/Revenue Streams																			
Peer Municipal Benchmarking Scan - Investigate alternative LOS & processes. Compare resourcing levels versus collected volumes etc.																			
Semi-structured Interviews + Facilitated Working Sessions with City/Region Staff Delivering No Bag/Bagged Leaf Collection																			
Develop "As Should Be" Draft Findings & Recomendations																			
Stress Test Draft Findings & Recommendations with City Staff/External Stakeholders Panel																			
Develop Change Management Implementation Plan - People/Processes/Technology																			
Submit Draft Report to City Manager + Council (Received & Sent Out for Public Consultation) + Post on website																			
External Stakeholder Leaf Collection Performance Evaluation/Feedback																			
Finalize Report & Submit to City Manager + Present Efficiency Review/Implementation Action Plan to Council																			

BURLINGTON SERVICE REVIEWS ALREADY HAVE TRACTION!

- ✓ City staff "Technical Leads" have been established for 4 Service Reviews
  - Added technical support from Finance & IT
- ✓ Data transfer to Performance Concepts/Dillon well underway
- ✓ Interviews & staff working sessions being scheduled as per the Critical Paths
- ✓ Burlington municipal peers being finalized (for Benchmarking scan)

CONCLUDING MESSAGE: EMPLOYING A VARIETY OF PERFORMANCE IMPROVEMENT "LENSES"

1. Climate Change Mitigation (Council Priority) – "Climate Lens"
2. Financial/Cost Management (Provincial Priority)
3. Streamlined/Disentangled 2-Tier Municipal Government
4. Continuous Improvement re. Service Planning & Delivery Processes
5. Migration to Sustainable Service Levels