



Executive Summary

Merrickville-Wolford Organizational Review November 2023

THE PROJECT

In July 2023, the Corporation of the Village of Merrickville-Wolford requested proposals from experienced municipal and/or Human Resources (HR) consultants to conduct a formal, full review of;

- the organizational structure;
- internal communications/procedures;
- allocation of duties;
- reporting relationships; and,
- workplace culture



THE ORGANIZATIONAL DESIGN PROCESS

Organizational design is a step-by-step process which identifies current challenges, what is working and not working regarding strategies, structures, systems, staff, culture, etc., and realigns them to fit current business realities/ goals.

Studies of this nature are by design, intended to use an evidence-based approach to look at all potential options with the goal of structuring organizational operations to deliver public services in an efficient and affordable way, to ensure the services meet the community's needs and maximize efficiencies for long-term sustainability.

Working collaboratively with staff and Council throughout the study, alternative organizational structures were designed and a preferred model was selected.

PROJECT OVERVIEW- Part 1

ASSESSING THE CURRENT SITUATION



- **The Consultants supporting this review were “Shaping Organizational Solutions (SOS) and E. Dean & Associates”**
- **Interviews held with Council & Staff**
- **Group Meetings with Employee Groups**
- **Document Review**
- **Summarize Findings**

OVERVIEW of KEY FINDINGS

**Strengths
To Build On**



FINANCIAL

**PROGRAMS and
SERVICES**

**Opportunities
For
Improvement**



**SYSTEMS PROCESSES
POLICIES STANDARDS
BYLAWS**

**LONG-TERM PLANNING
HUMAN RESOURCES**

STRENGTHS TO BUILD ON

- Most described the financial accounting services as working well
- Staff and Council have a strong focus on Customer Service
- Staff are perceived internally as cheerful and helpful
- Through the last challenging years, services continued to be provided to the citizens of the municipality
- Staff has kept up with the need to maintain essential services, with many staff doing more than their own jobs,
- Efforts have been made to improve customer service with limited number of staff and high staff turnover
- Vibrancy returning for tourism, planning and continuing focus on heritage.
- Economic Growth - new business, new homes and subdivision development

OPPORTUNITIES FOR IMPROVEMENT

SYSTEMS & PROCESSES

- Outsourcing the planning and engineering services does not appear to meet the municipality's needs. Insufficient planning support is resulting in slow responses and delays in projects.
- Insufficient Administrative support was identified by Administration & Public Works
- Managers time is focused on day-to-day operational issues resulting in insufficient time to undertake management level duties such as; long-term planning, improving the effectiveness of current systems and procedures, and updating policy and standards; etc.
- Administrative and Political roles and responsibilities need to be better defined and clarified.
- Communication is challenging throughout the organization, clearer direction from Council would assist staff in their work and better access to staff reports would assist Council in making informed decisions
- Missed opportunities for additional revenue for the municipality were identified, (i.e. marriage licenses, impost fees, etc.)
- Insufficient planning or Administrative support in place to meet municipal planning demands

OPPORTUNITIES FOR IMPROVEMENT

POLICIES, STANDARDS & BY-LAWS

- Staff often dealing with outdated bylaws, standards, policies and procedures – examples were provided in many areas- causing a lot of additional work with minimal time available as the reason they aren't being completed. For example: Zoning By-law #23-2008 is inconsistent with the 2020 Official Plan. This results in undue costs and delays for citizens and developers forcing them to rezone due to the zoning by-law not permitting something that is permitted in the Official Plan.
- Lack of updated HR policies and procedures in place

OPPORTUNITIES FOR IMPROVEMENT

LONG-TERM PLANNING

- Minimal Strategic, long term planning in place at both the Council, Department and Staff levels
- No clear process in place for developing Council priorities or staff workplans, deliverables and measures that are agreed upon.
- Insufficient planning for, and underfunding of, infrastructure. (roads, equipment, facilities)
- Major need for longer range financial forecasting, specific plans in place for replacement of all current assets such as roads, water, sewer, buildings, roads dept equipment, technology, etc.
- Need an improved budgeting process and greater clarity on expectations

OPPORTUNITIES FOR IMPROVEMENT

HUMAN RESOURCES

- Concerns with high staff turnover, particularly in 2023 – many vacant positions
- Poor recruitment practices and HR planning in place resulting in staff positions being vacant for up to a year or more or staff not having all the supports required or skill sets needed to manage their department portfolios.
- Poor pay practices and no pay equity maintenance in place.
- Insufficient HR and management skill sets available in-house for supporting HR or undertaking management responsibilities.
- The lack of a well developed and implemented performance management process and policy makes managing expectations, working towards expected results and training and development unfocused. No effective performance management program in place for the CAO.

OPPORTUNITIES FOR IMPROVEMENT

TRAINING

- Legislatively required training has fallen behind
- Lack of resources and time to address the skills sets that are lacking in the organization such as; senior financial management skills, a range of human resource management skills, senior management skills , organizational and supervisory skills, conflict resolution skills, etc.
- Staff often must take on new duties to fill in gaps and positions are implemented without appropriate training. Training and development is under resourced.
- Lack of sufficient planning and economic development skills currently in place
- Lack of sufficient senior Public Work expertise in place
- Minimal training budget or plans in place to support current staff structure

TECHNOLOGY

- More support needed to assist Council. Improved, dedicated IT portals will ensure all of Council has access to the same information to make informed decisions.
- Minimal time/resources to look at or begin to utilize IT tools to assist with reducing workload.
- Update municipal website to provide improved information for citizens

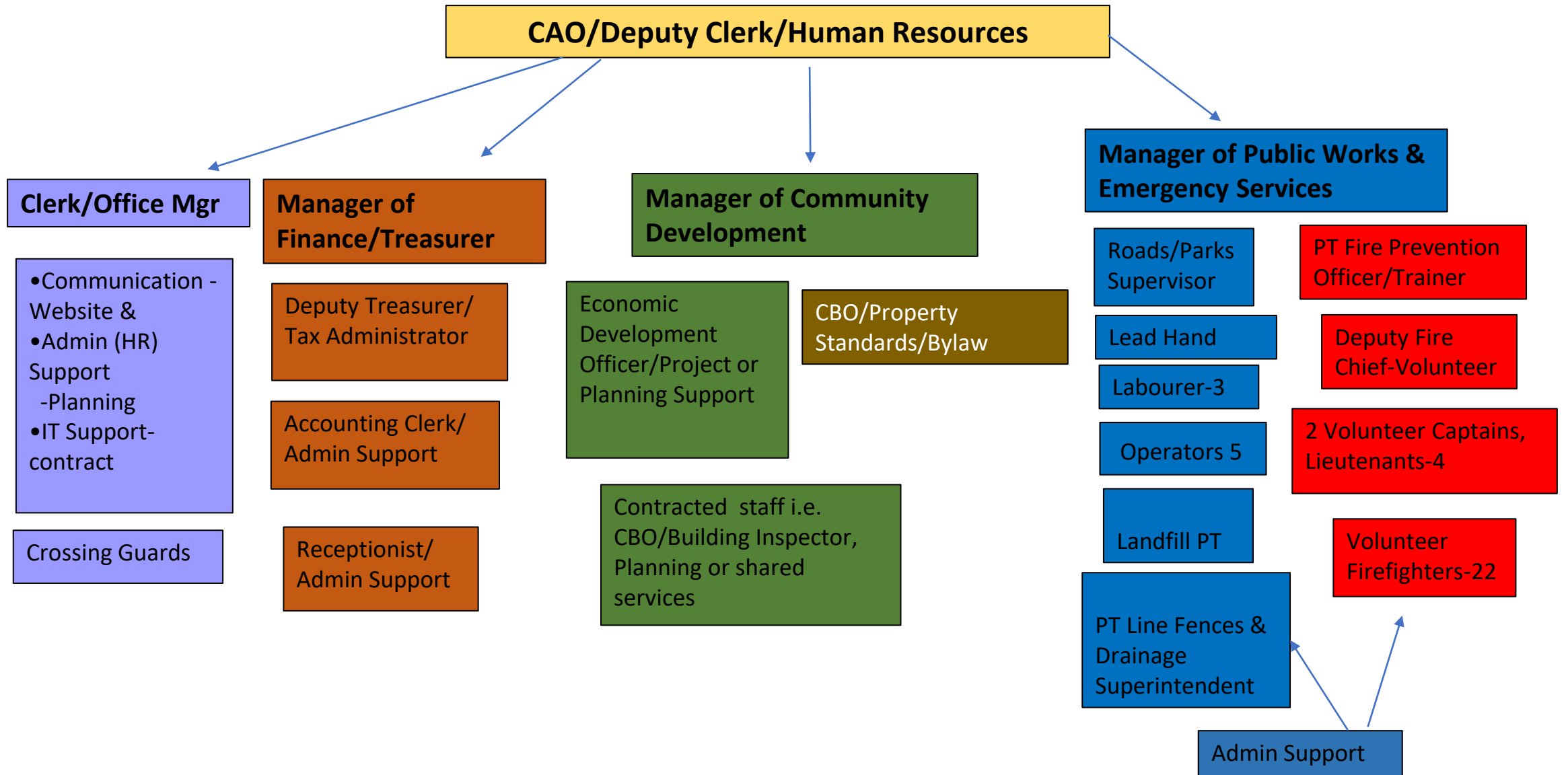
PROJECT OVERVIEW-Part 2

DEVELOPING THE FUTURE STATE DESIGN

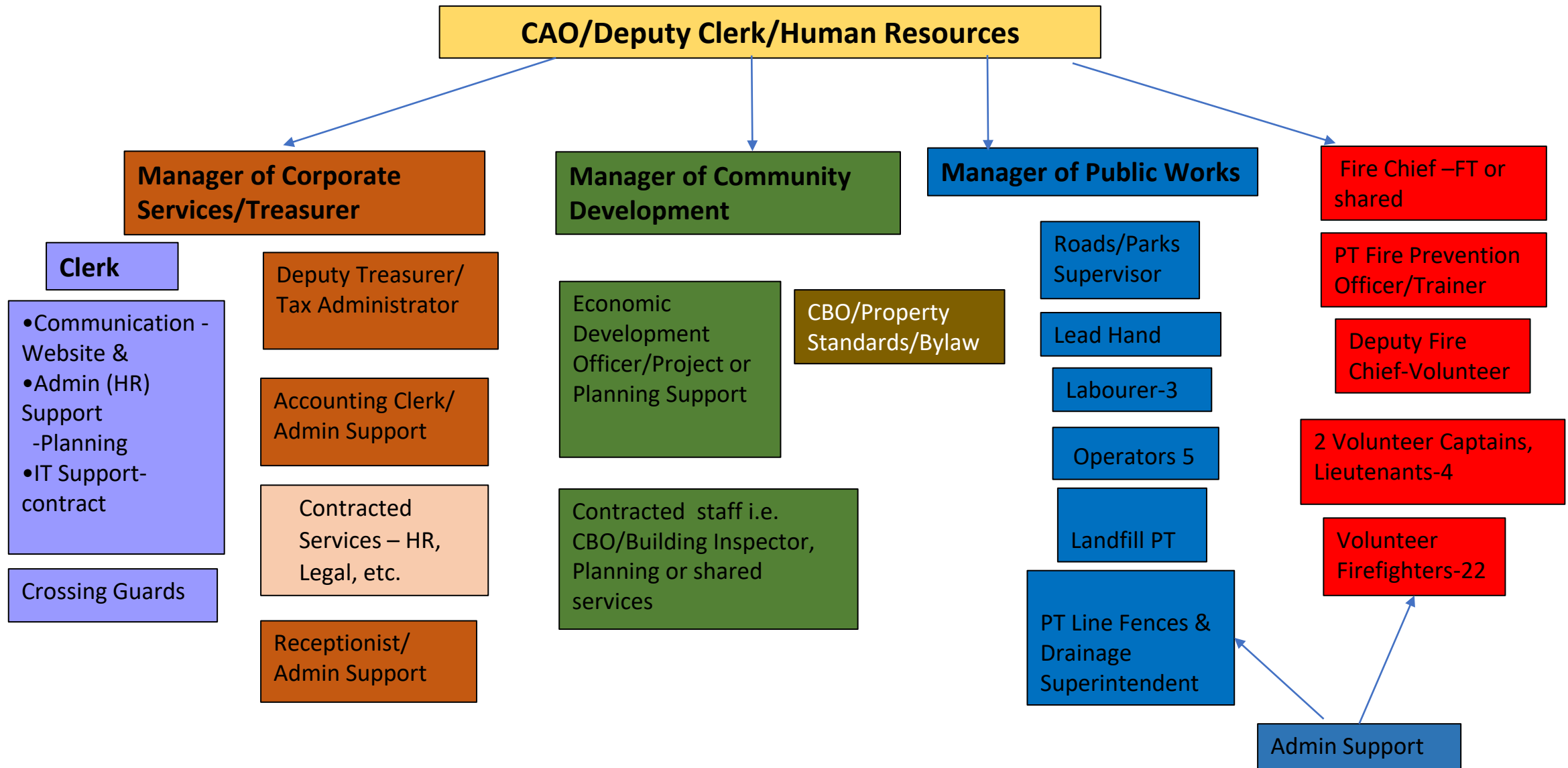
- Group Sessions held with Council & Senior Staff – Present & Validate Findings
- Joint Group Focus Group - Select preferred organizational structure Findings & Recommendations
- Final Report



PREFERRED ORGANIZATIONAL STRUCTURE 2024-2025



PREFERRED FUTURE ORGANIZATIONAL STRUCTURE 2026

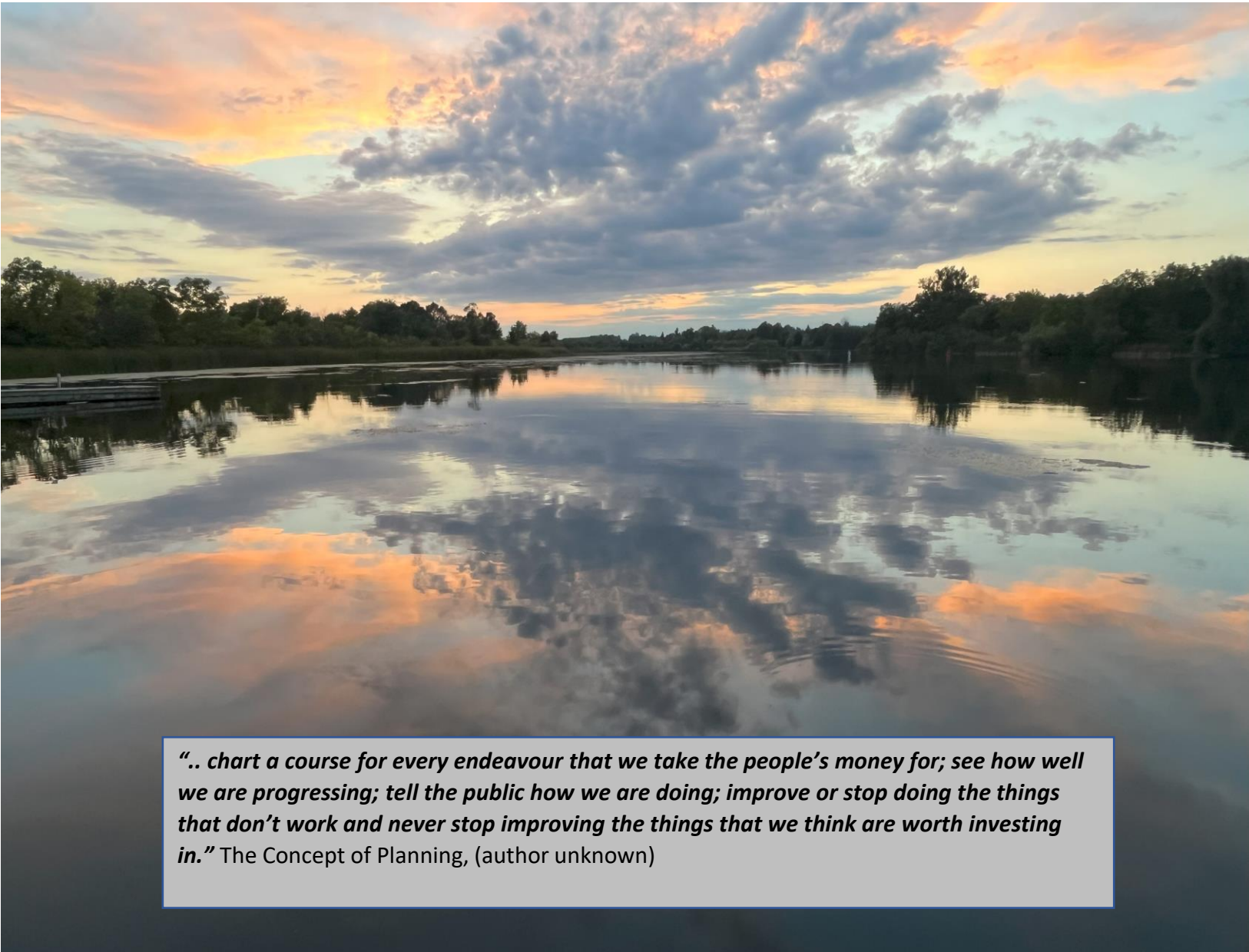


FINDINGS & RECOMMENDATIONS

A **Summary of the Findings & Recommendations** was developed, which also includes **Budget Considerations** and **Recommended Timelines** for completion of the recommendations.

The recommendations will help to:

- Reduce workplace redundancies, address current gaps and reduce staff turnover
- Eliminate conflicting priorities and support becoming a lean cost-effective structure
- Increase team-member coordination, communication, and buy-in
- Empower Council and Staff to work together to shape the future of the organization
- Support the organization to be able to better meet the community's needs - a must in a rapidly changing economy



".. chart a course for every endeavour that we take the people's money for; see how well we are progressing; tell the public how we are doing; improve or stop doing the things that don't work and never stop improving the things that we think are worth investing in." The Concept of Planning, (author unknown)

In the end, there is really no single, perfect way to structure municipal operations, but this report includes opportunities for organizational improvements.

The potential opportunities identified will assist Council and staff with moving the Municipality forward into the future.