



Council Workshop Meeting

Agenda

Date: December 15, 2022
Time: 9:30 a.m. and 1:00 p.m.
Location: Hybrid meeting- virtual and Council Chambers, City Hall

Pages

1. Declarations of Interest:

2. Delegation(s):

This meeting is a workshop and no delegations will be registered. Only staff directions and motions to receive and file will be permitted.

3. Consent Items:

Reports of a routine nature, which are not expected to require discussion and/or debate. Staff may not be in attendance to respond to queries on items contained in the Consent Agenda.

4. Regular Items:

4.1 Service information workshop (CWC-04-22) 1 - 16

Note: This workshop is scheduled over four days - November 29 and 30, December 12 and 15, 2022.

a. 9:30 a.m. - Good Governance Part 1, Enabling Services Part 2 and An Engaging City Part 2 17 - 45

b. 1:00 p.m. - Good Governance Part 2 and Enabling Services Part 3 46 - 68

5. Confidential Items:

Confidential reports may require a closed meeting in accordance with the Municipal Act, 2001. Meeting attendees may be required to leave during the discussion.

6. Procedural Motions:

7. Information Items:
8. Staff Remarks:
9. Committee Remarks:
10. Adjournment:

Service Information Workshops - Closing Session

December 15, 2022



Agenda



- Information Session Recap



- Key Priorities and Themes



- Human Capital Forecast



- Roadmap Forward



- Discussion



Service Structure of the City



A City that Grows

- Building Code Permits and Inspection
- Burlington Economic Development
- Community Design and Development Review



A City that Moves

- Parking Management
- Road and Sidewalk Maintenance
- Roads and Structures - Design and Construction
- Specialized Transit
- Traffic Operations Management
- Transit
- Transportation Planning



A Healthy and Greener City

- Cemetery
- Environment and Energy
- Organized Sport Support
- Parks and Open Space - Design and Development
- Parks and Open Space - Maintenance
- Recreation
- Surface Water Drainage
- Urban Forestry



An Engaging City

- Art Gallery of Burlington
- Arts and Culture
- Burlington Museums
- Burlington Performing Arts Centre
- Burlington Public Library
- Corporate Communications and Engagement
- Tourism Burlington



A Safe City

- Animal Services
- By-Law Enforcement and Licensing
- Emergency and Continuity Management
- Fire Protection and Prevention
- Halton Court Services



Good Governance

- Corporate Legal
- Corporate Strategy
- Internal Audit
- Legislative Services
- Mayor and Council



Enabling Services

- Asset Management
- Corporate Customer Experiences - Service Burlington
- Facilities and Buildings - Design and Construction
- Financial Management
- Fleet Management
- Geographic Information and Mapping
- Human Resources
- Information Technology
- Sign Production

Investment in City Services



The chart below illustrates where the City invests the revenue it receives from property taxes for these service categories



*values in millions

Risks to Achieving Our Objectives



Corporate Risks

Inflation

Staff illness and burnout

Staff Attraction & Retention

New Legislation

Project/initiative overload

How are we managing these risks

Updating project costs and managing expenses where possible

Recently enacted mask mandate, Fill vacancies

New Job Evaluation Program

Monitor, comment and advocate for Burlington's interests

Prioritization of projects, new Enterprise Business Planning & Portfolio Management

Risks to Achieving Our Objectives



Service Delivery Risks

Staffing Vacancies

Change fatigue and staff burnout

Continued COVID Impacts

Aging technology and assets

Supply chain delays

How are we managing these risks

New Job Evaluation Program, Fill vacancies

Prioritization of projects and initiatives

Monitoring staff illness statistics and Government COVID Impact Funding Opportunities

Updated Digital Strategy

Monitor and make accommodations where applicable

Results Based Accountability (RBA)



2 – Kinds of accountability

- Population accountability
- Performance accountability

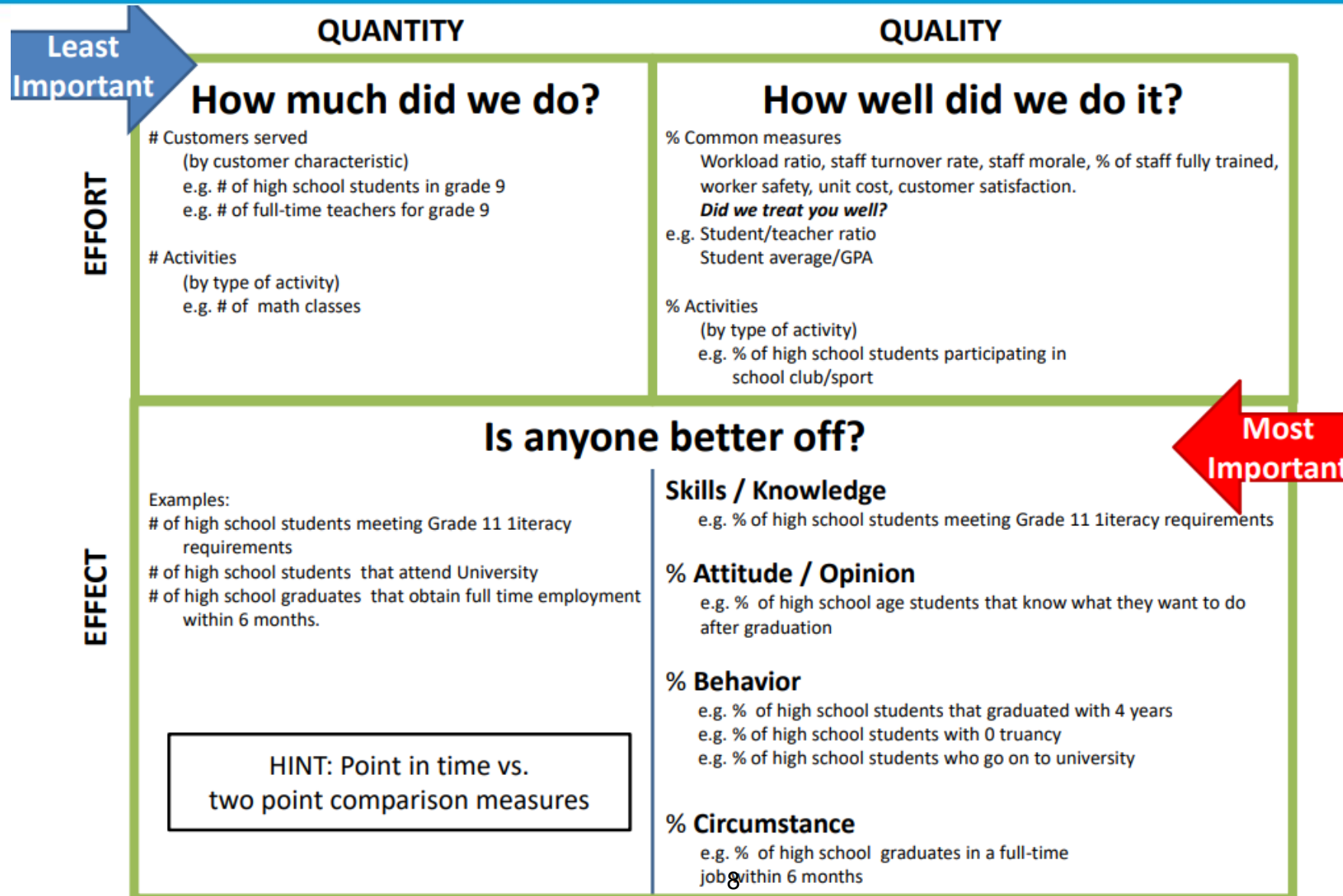
3 – Kinds of performance measures

- How much did we do?
- How well did we do it?
- Is anyone better off?

7 – Performance accountability questions (in less than an hour)

- 1) Who are our customers and how much do we do?
- 2) How well do we do it?
- 3) Is anyone better off?
- 4) How are we doing on the most important of these measures?
- 5) Who are the partners that have a role to play in doing better?
- 6) What works to do better, including no-cost and low-cost ideas?
- 7) What do we propose to do?

Results Based Accountability (RBA)



Source : Mark Friedman founder and director of the Fiscal Policy Studies Institute www.resultsaccountability.com

2023 Key Service Priorities Summary



Focusing and Designing for the Customer's Experience



Transforming to Digital Solutions



Attracting and Retaining Great People



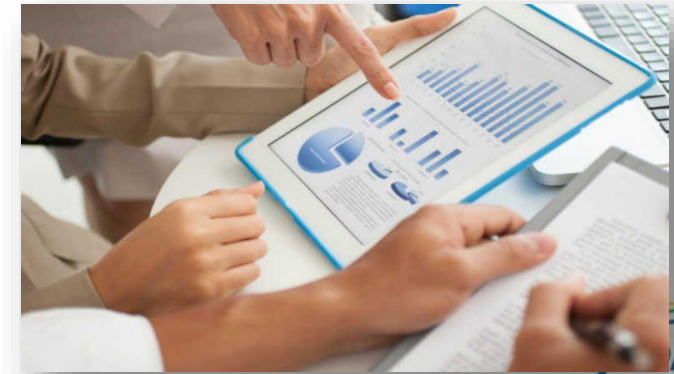
Navigating and Responding to Change



Shifting from Reactive to Proactive



Getting Better at Using Data



Service
Investment

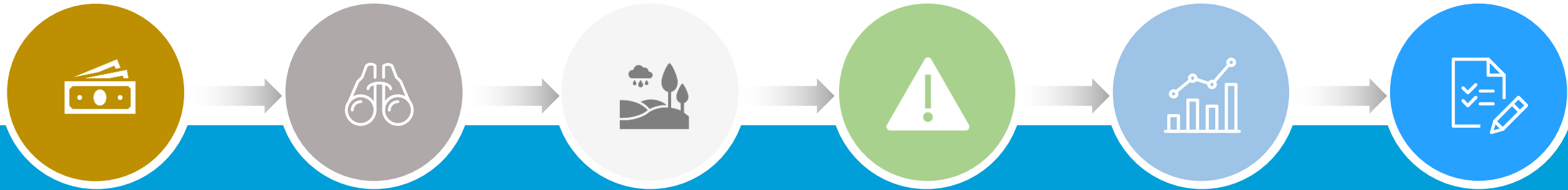
Current
Service
Delivery

Asset
Investment

Service
Delivery Risks

Key
Performance
Indicators

Service Goals
and
Objectives



Key Themes

- Community engagement and our customer's experiences with ease in access to city services are a primary focus into 2023.
- Continue to invest Business Transformation through the implementation of AVL, ERP, EAMS.
- Investing in people and staff resources are critical to delivery of services. Ensuring staffing models and resource capacity matches the expected service levels.
- Investing in a Climate Resilient Burlington affects the service delivery for many areas.
- Infrastructure plans, master plans and community plans continue to be foundational to address responsive growth, good asset management and financial responsibility.

Service
Investment

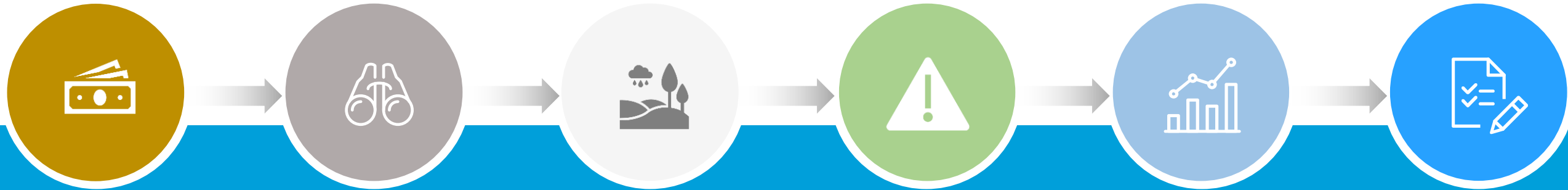
Current
Service
Delivery

Asset
Investment

Service
Delivery Risks

Key
Performance
Indicators

Service Goals
and
Objectives



Key Themes

- Technology, information, data and digital transformation are fundamental to the future of the organization
- To continue to grow responsibly and ensure a safe city, the growth of resources in the organization must meet the need to deliver the services
- The speed of change and the need to shift approaches to match expected service delivery is complicated and necessary however takes time and money.
- The delivery of many plans, initiatives, projects and processes rely heavily on coordinated efforts and streamlined processes.
- Current legislative pressures are driving change and, in some areas, significantly changing the way services are delivered
- Corporate culture needs attention for several reasons; staffing vacancies, workload expectations and the continued learning curve of the hybrid approach

Human Capital Forecast



Department		2019-2022		Proposed		Forecasted							
		Total		2023*		2024**		2025		2026		Total	
		FT	PT	FT	PT	FT	PT	FT	PT	FT	PT	FT	PT
Direct Customer Facing	Engineering	2.9		2.0				1.0				5.9	
	Fire	2.0	0.5	4.0		12.0		11.0		13.0		42.0	0.5
	Recreation, Community & Culture	8.1	(5.1)			13.7	(5.45)	1.0				22.8	(10.6)
	Roads, Parks & Forestry	20.0	(1.1)	4.0	1.2	15.0		8.0		2.0	4.85	49.0	5.0
	Community Planning	19.0				1.0						20.0	
	Transportation		(1.0)	1.0				1.0				2.0	(1.0)
	Transit	23.0	1.6	9.0		15.0	0.4	12.0	1.0			59.0	3.0
	Building & By-Law	7.0										7.0	
	By-law Compliance (established 2023)			5.0		3.0		6.0		2.0		16.0	
	Customer Experience	1		3.0		2.0		1.0				7.0	
	Mayor's Office			1.0								1.0	
Direct Customer Facing - Total		83.0	(5.1)	29.0	1.2	61.7	(5.1)	41.0	1.0	17.0	4.85	231.7	(3.1)
Strategic Support Services	Office of the City Clerk	1.0				1.0		2.0		1.0		5.0	
	Corporate Legal	1.0		2.0		4.0						7.0	
	Finance			2.0		2.0		1.0				5.0	
	Human Resources	3.0		5.0		5.0		1.0				14.0	
	Digital Service (formerly Information Technology Services)	6.0	(0.1)	10.0	(0.5)	11.0		4.0		3.0		34.0	(0.6)
	Corporate Strategy			1.0		1.0						2.0	
	Corporate Communications & Engagement	2.0		1.0		2.0						5.0	
	EICS - Facilities and Environment & Energy	1.0		1.0		1.0		3.0				6.0	
Strategic Support Services - Total		14.0	(0.1)	22.0	(0.5)	27.0	0.0	11.0	0.0	4.0	0.0	78.0	(0.6)
Total		97.0	(5.2)	51.0	0.7	88.7	(5.1)	52.0	1.0	21.0	4.85	309.7	(3.7)

* 2023 proposed does not include one-time funded positions

** 2024 includes positions not accommodated in 2023 proposed budget.

Budget 2023 Pressures



Economic Factors
(Inflation, Supply Chain)

Labour Market
& Workforce

Legislative
Changes

Strategic
Community
Investments

Infrastructure
Funding

COVID-19

Environmental
Considerations

Community
Festivals &
Events



Timelines

Council Workshops	Service Information Sessions November 29 & 30, December 12 & 15, 2022
CSSRA	2023 Budget Overview January 9, 2023
Virtual Budget Townhall	January 19, 2023 7:00 - 8:30 pm
CSSRA	2023 Budget Review & Approval February 7 & 9, 2023
Council	2023 Budget Approval February 14, 2023



Final Thought

We know more today than we did yesterday.

We will know even more tomorrow than we do today.

That's the knowledge we will build on.



Service Information Session
Day 4 Session 7
December 15, 2022

Enabling Services, Good Governance & An Engaging City



Agenda



- **Service Investment**



- **Current Service Delivery**



- **Asset Investment**



- **Service Delivery Risks**



- **KPIs**



- **Service Goals and Objectives**

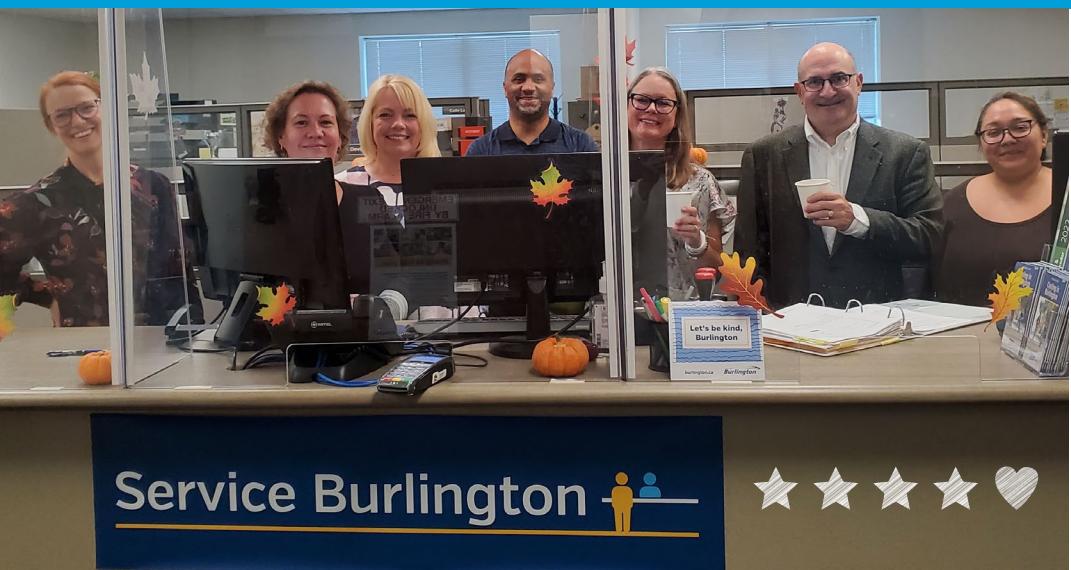
Enabling Services, Good Governance & An Engaging City

Legislative Services &
Office of the City Clerk

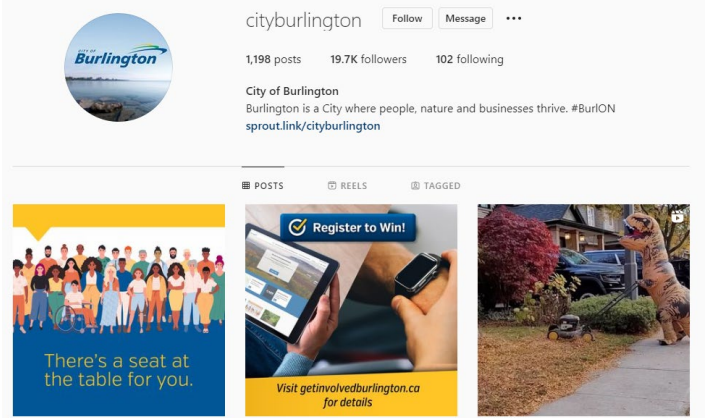
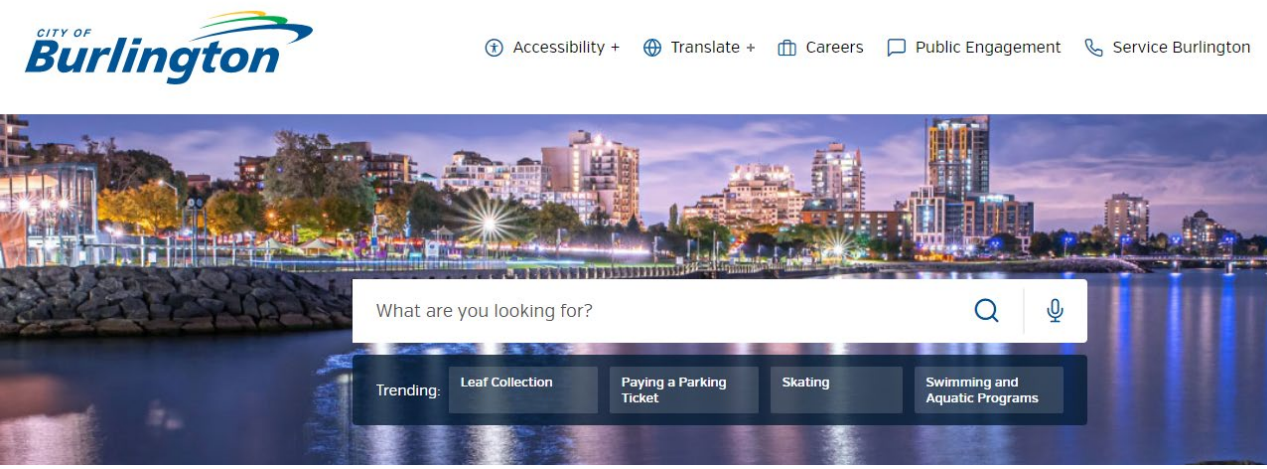
Customer Experience (CX)

Corporate Communications
and Engagement (CCE)

Who Are We?



- ### Boards and Committees
- + Audit Committee
 - + Burlington Accessibility Advisory Committee (BAAC)
 - + Burlington Agricultural and Rural Affairs Advisory Committee (BARAAC)
 - + Burlington Integrated Transportation Advisory Committee
 - + Burlington Municipalization Committee (Mund)
 - + Burlington Museums Board
 - + Burlington Public Library Board



Who Are We?



Service Investment

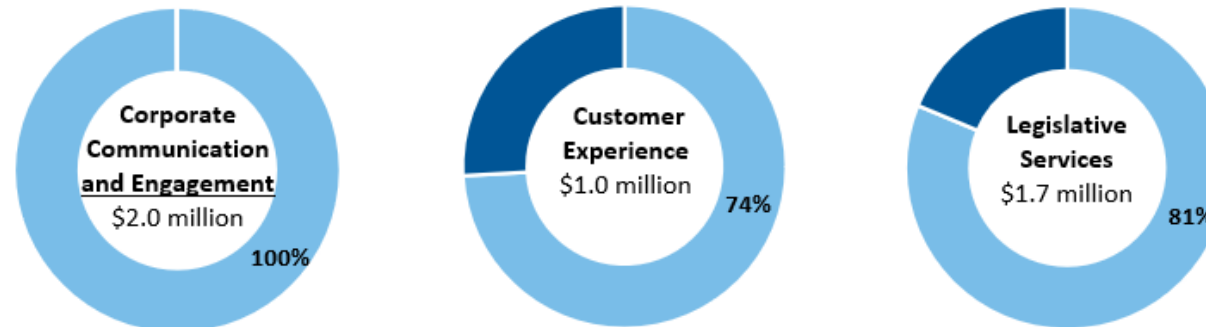


Operating Investment Including One time COVID Impacts

Services	2022 Approved						
	Total Expenses	Total Revenues	Net Budget	% Of Tax Levy	Full Time FTE	Part Time FTE	Total FTE
Legislative Services	\$ 2,113	\$ (395)	\$ 1,718	0.91%	12.0	0.3	12.3
Corporate Communications and Engagement	\$ 2,063	\$ (2)	\$ 2,061	1.10%	16.0	0.3	16.3
Customer Experience *	\$ 1,359	\$ (352)	\$ 1,007	0.54%	11.0	1.2	12.2
Total Engaging City	\$ 5,534	\$ (748)	\$ 4,786	2.55%	39.0	1.8	40.8

Numbers are in \$ Thousands and may not add due to rounding

Percentage of 2022 Operating Investment Funded by Property Taxes



■ Net Property Tax Supported ■ Other Revenues and Recoveries

Service Priorities

“Delivering customer-centric services with a focus on efficiency and technology transformation”



Public Engagement

- Connect with diverse public
- Modernize web content
- Provide inclusive design
- Communicate what people want to know, when and how they want to know it
- Meet people where they are
- Manage our online presence
- Support volunteers



Good Governance

- Provide leadership on legislative policies, by-laws, processes and procedures
- Implement the Information Management policy
- Encourage open government
- Educate City staff on information management, FOI and privacy
- Represent democratic values



Customer Experience

- Resolve customer requests at the first point of contact
- Optimize the CRM system
- Document and manage knowledge
- Gather and use customer feedback
- Educate City staff on how to provide easy, inclusive, accessible and outstanding customer experiences
- Analyze and share data-driven insights



Community Relations and Engagement

Build trust and confidence in the City as a public organization

Recent Continuous Improvements



Service	Accomplishment
Corp. Communications & Engagement	Successful shift to virtual & online engagement ongoing. A vast majority of residents support continuing virtual & online engagement. In-person and hybrid options will still be available.
Corp. Communications & Engagement w/ CX	July 2022, a redesigned website launch makes it easier for residents and visitors to find information and access online services.
Corp. Communications & Engagement	July 2022, a new centralized volunteer program (Better Impact) better serves volunteers. All volunteer opportunities with the City can now be found at burlington.ca/volunteer .
Corp. Communications & Engagement	September 2022, the City's social media accounts rank #2 behind Toronto in GTA Social Media Profiles.
Corp. Communications & Engagement	Newcomers Outreach and Engagement group continues working closely with the Halton Multicultural Council (HMC Connects) to make engagement opportunities and communications more welcoming to newcomers.

Recent Continuous Improvements



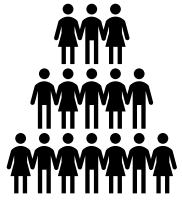
Service	Accomplishment
Corp. Communications & Engagement w/ City Clerk and Customer Experience	Spring 2022, launched a new standalone microsite for 2022 municipal election. Summer 2022, new CRM configuration and knowledge base articles on election requests.
Customer Experience	First full year of CRM and contact centre implementation with Roads, Parks and Forestry; 91% first point of contact resolution during January 2022 winter storm (630+ requests) with ability to report and complete performance analysis after event
Customer Experience	Customer Experience dashboard for data analysis available to all burlington.ca network accounts, updated every 24 hours; showing customer request trends, type, timing and location
Customer Experience	New Customer Service Standards, Customer Service Support Deck, CX lunch and learns, workshops, Customer Service Week, Learn at Work Week activities for internal CX education
Customer Experience	New Voice of the Customer initiatives: New Coyote Sighting form, new Customer Feedback survey on Get Involved Burlington

Recent Continuous Improvements



Service	Accomplishment
Legislative Services	New Delegated Authority By-Law, reflects current business practices and changes in policy, legislation, clarifying delegations ensures streamlined and expedited approvals.
Legislative Services	Reworked elector support model, use of CX to triage tier one enquires, during Online voting provided extended hours for technical support until 8pm during the online advance voting period.
Legislative Services	Review and amendments made to foundational Election policies and procedures. This helped to ensure clarity, compliance with legislation, and to reflect best practices.
Legislative Services	Expanded Voters' list revision program. Worked in partnership with Burlington Public Library to deputize library staff to accept forms. 360 revisions completed at the Library.
Legislative Services	Privacy Impact Assessment (PIA) standard operating procedure (SOP) for enhanced policy compliance and simplifying information management practices.
Legislative Services	Last phase of the Hybrid Council meeting plan approved in March 2022, included Council and staff in Chamber (Hybrid), then gradually adding registered delegates and then general spectators.

Service by the Numbers



40,000 Customer Requests each year

58,000+ Contact Records in CRM

99% Requests Resolved

58% Resolved at first point of contact

2.6 minutes Average Call Duration



52% callers enjoy live answer right away

5 seconds average wait on hold

10 Customer Experience Representatives

4 customer contact channels



154 Media releases issued

50 Surveys issued

17 Instagram reels created in 2022

509 Volunteers in Better Impact

8000+ Users in GetInvolvedBurlington

28,000+ Subscriptions to all newsfeeds

80,000+ Followers across social media channels

6M+ web page views on burlington.ca



140 2022 Committee and Council Meetings

196 2021 Committee and Council Meetings

404 2022 Reports on agendas

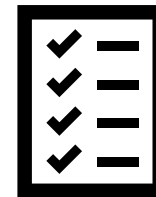
361 2021 Reports on agendas

120 2022 delegates to Standing Committees

28 2022 delegates to Council

120 2021 delegates to Standing Committees

9 2021 delegates to Council



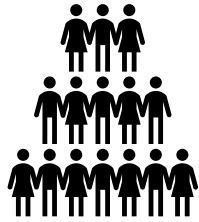
360 Revision forms at libraries 18% of total

Revision forms processed

38.1% of voters voting online 2022

10.2% of voters voting at advance polls 2022

But was anyone better off?



- Simple, central, easy contact at **905-335-7777 | city@burlington.ca**
- More customers are recognized
- More data on request history
- Get an answer without transfer



- Avg resolution in under 3 minutes
- Connect easily with a real person
- Don't waste time on hold



- More informed and engaged participants
- Seamless volunteer opportunities
- Better volunteer onboarding experience
- Clear and plain language on City website



- More efficient public meetings
- Greater information to Council
- Greater sharing of staff expertise



- Voter list updates in the community
- Easy access to online voting
- More options, places and dates to vote



- Different ways to receive information
- Customers can choose preferred channel
- People come first

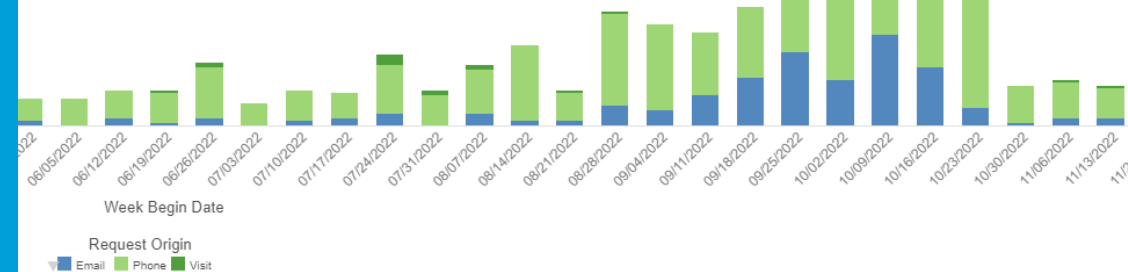
Feature Story: Election 2022



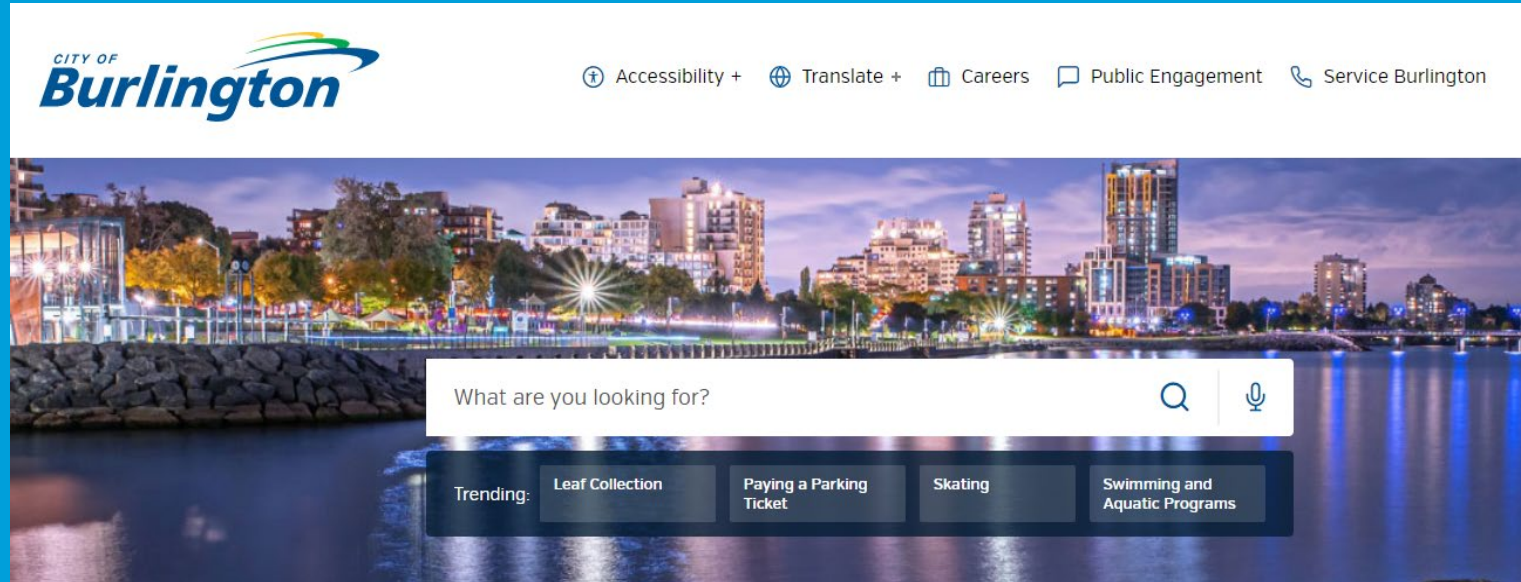
VOTE

2022 BURLINGTON

763 Election requests
98% Resolved at first point
45 Hours staff time



Feature Story: burlington.ca



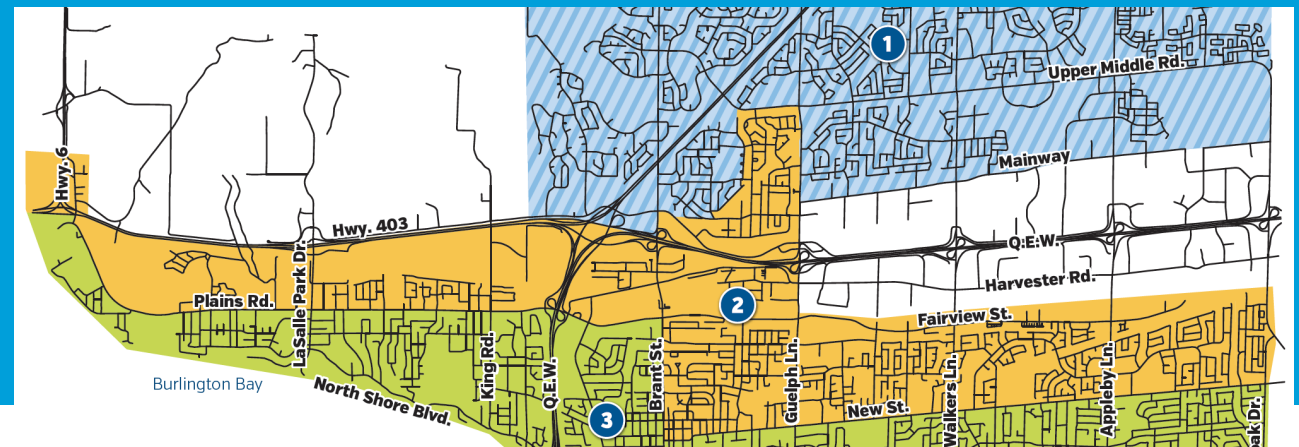
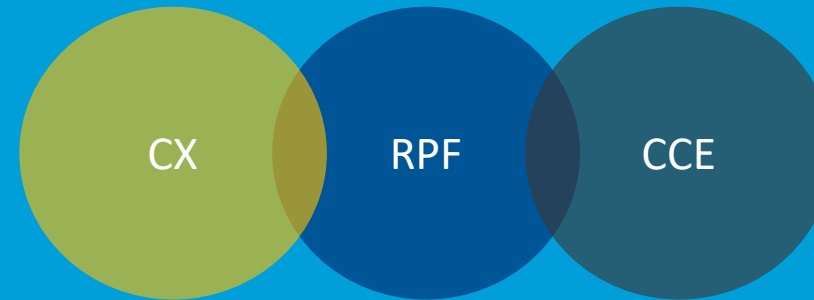
Feature Story: Leaf Collection

2021

- 367 Requests
- 96% Resolved at First Point
- 17.6 hours of staff time

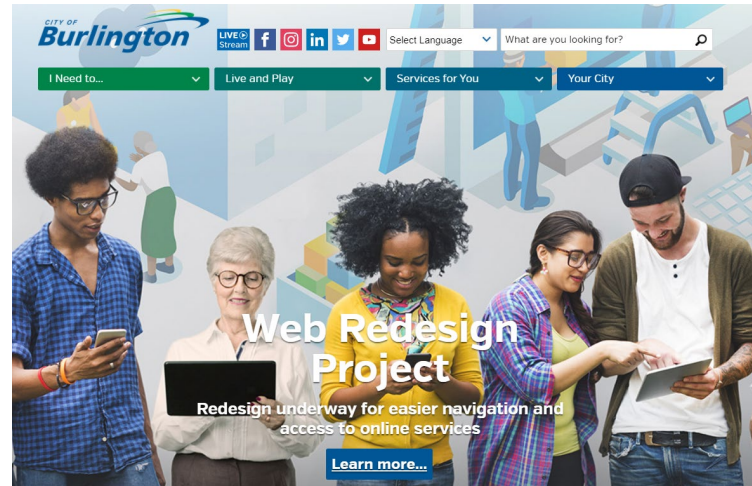
2022

- 350 Requests
- 98% Resolved at First Point
- 17.8 hours of staff time



Recent Asset Investments

Capital Project Highlights



CRM System Enhancements

Data Integration & Analysis



Service Burlington Space

Current Service Delivery Risks

Stabilizing Operations

- Lack of training for City-wide staff in many areas:
 - Customer empathy
 - Journey mapping design & UX
 - Diversity, Equity and Inclusion
 - Accessibility
 - Access to Information
 - Privacy Protection
- Staff turnover rate that impacts service delivery
 - Manager to City of Toronto
 - Analyst headhunted to Mgr role
 - Competing for IM expertise
- Need investment in the CX team to normalize multiple contract positions and provide stability
- Staff resources to meet ongoing and future communications and engagement needs of residents

Funding Gap

- More funding required for training, education and development
 - Articulate licenses
 - Outside expertise, speakers
 - CX & IM certification
 - Subscriptions
 - Industry leaders i.e. Forrester
- Additional funding will be required beyond 2023 for CRM Dynamics V9 upgrade and data integrations

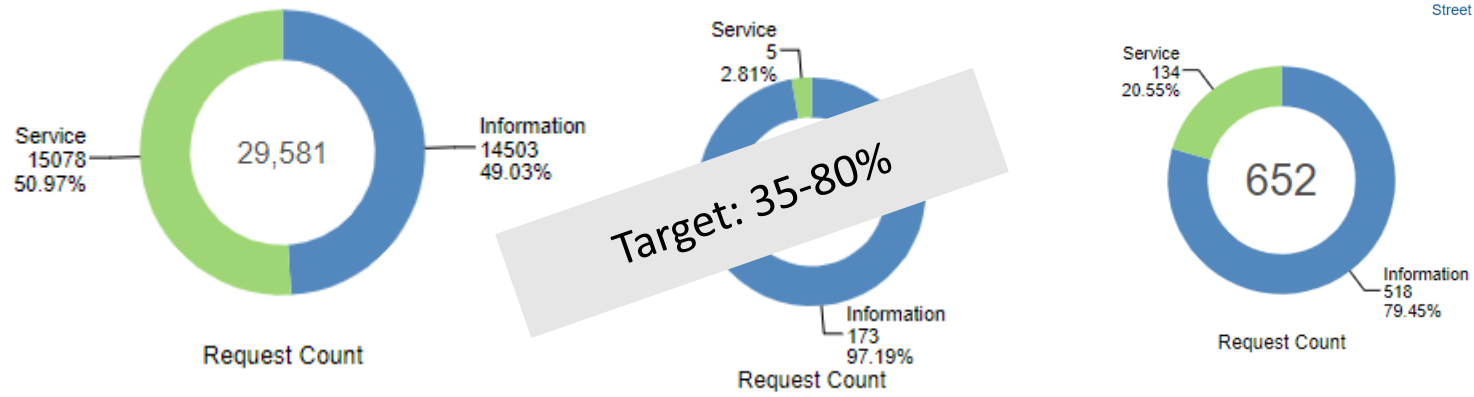
Risks to Achieving Objectives

- Low capacity and feelings of overwhelm across City staff; challenge for all new initiatives and poor employee experience compromises organizational performance overall
- Customer-centric culture still faces challenges in the organization: presence of a customer in real time is not consistently viewed as a priority for work effort
- Scope and complexity of data architecture and integration required for seamless digital service experience and modernized web environment
- Lack of training for staff in areas of empathy, inclusivity, diversity and new technology
- Speed of adaptation and adjustment to changing resident demands for enhanced communication and engagement
- Legislative changes in the Province of Ontario

Customer Experience Headline Measures

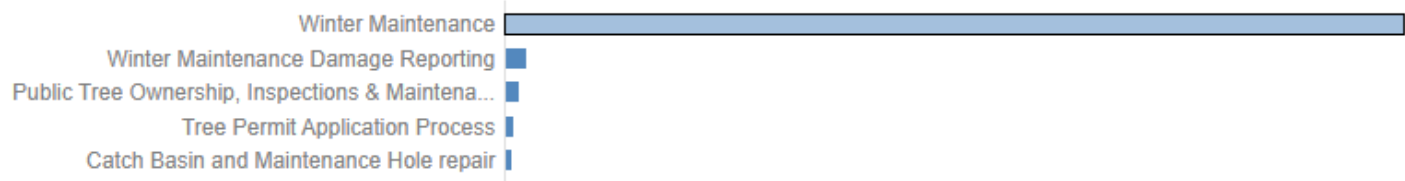


At least **49%** of all requests for CRM-enabled departments are completed at **first point** with Service Burlington



We have more data available on what services and information customers need, and when

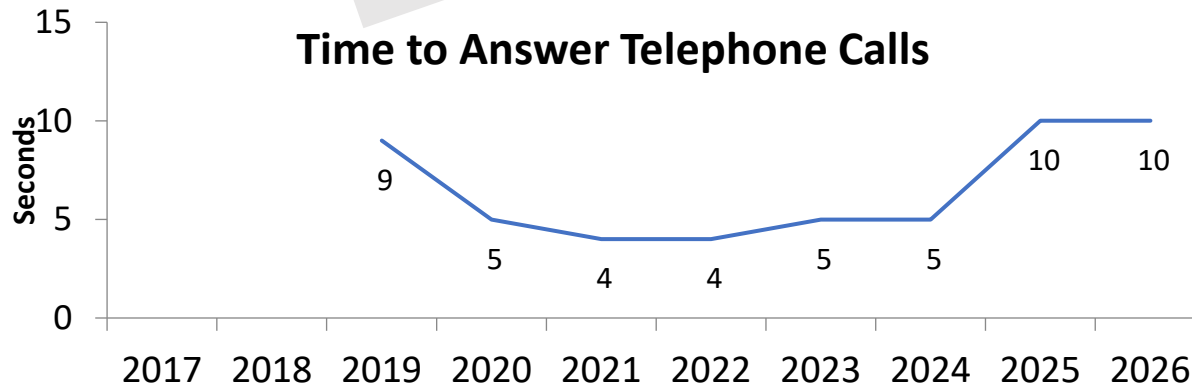
During significant events i.e. January snow event and leaf collection, the rate of first point contact resolution increases significantly (**79% & 97%**)



Customer Experience Headline Measures



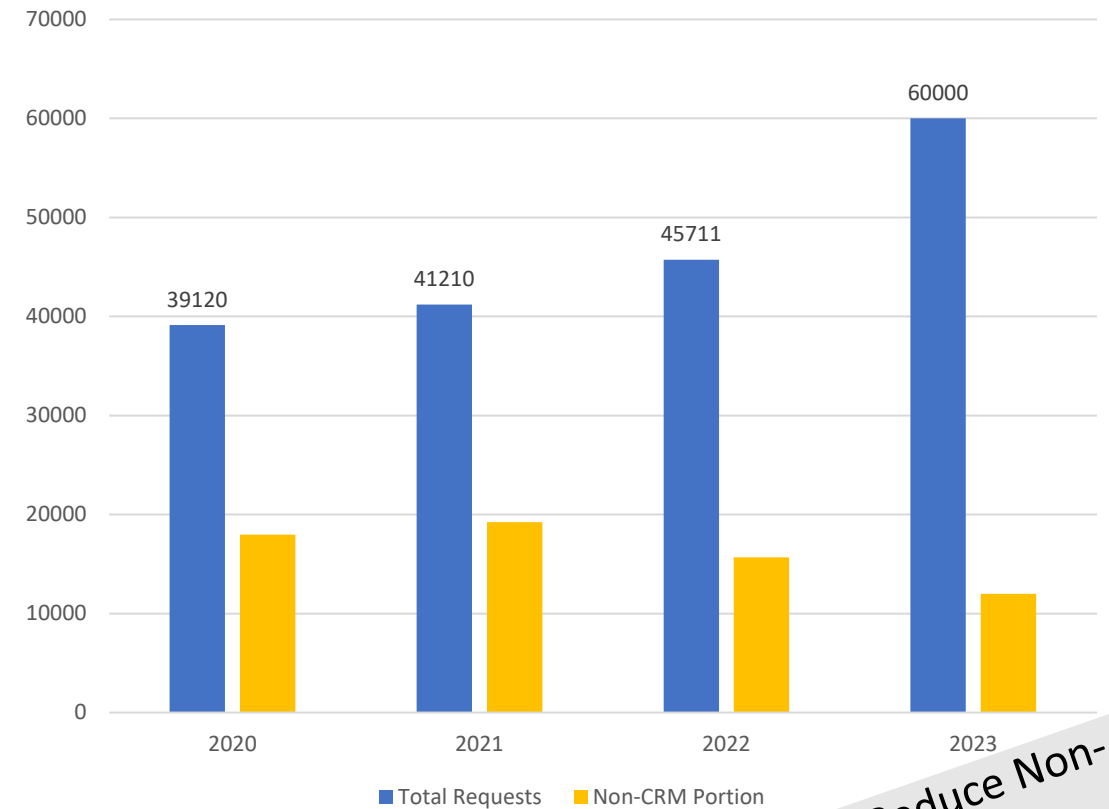
Target: 10 Seconds



Service Burlington Completed
3,248 Tax Payments
1,624 RCC Registrations
 And is currently managing
239 Knowledge Base Articles

Target: Growth

More Requests Benefiting from CRM End-to-End Data Capture, Notes, Search and History

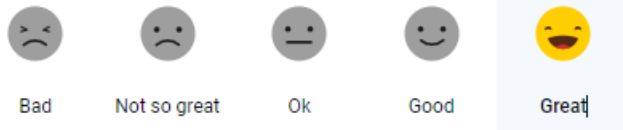


Target: Reduce Non-CRM

Other CX Key Performance Measures

- Ahead of industry averages for time to answer and hold times
- Now measuring Net Promoter Score and Customer Effort Score, aligning with CX industry standards

1. How was your most recent experience with the City of Burlington?



2. What was the best thing about your experience?

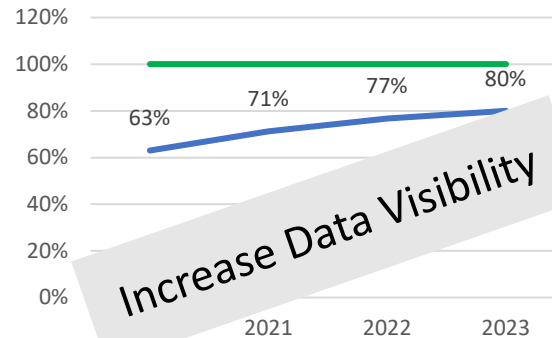
Please add your comment here... 0/255

3. What was the worst thing about your experience?

Please add your comment here... 0/255

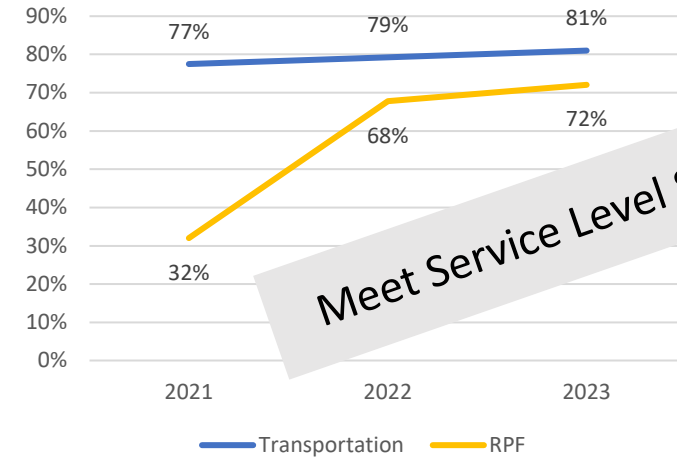
Gather, Share and Use More Customer Feedback

% Customer Requests to Service Burlington Managed End-to-End in CRM



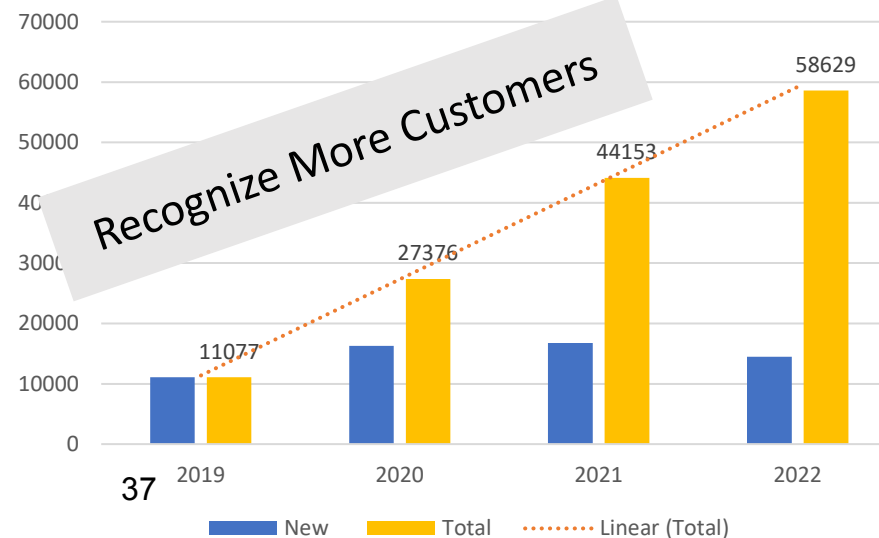
Increase Data Visibility

Service Level Compliance: Contact Centre and Service SLA 1 & SLA 2 Met on Time



Meet Service Level Standards

Customer Contact Record Creation & Growth



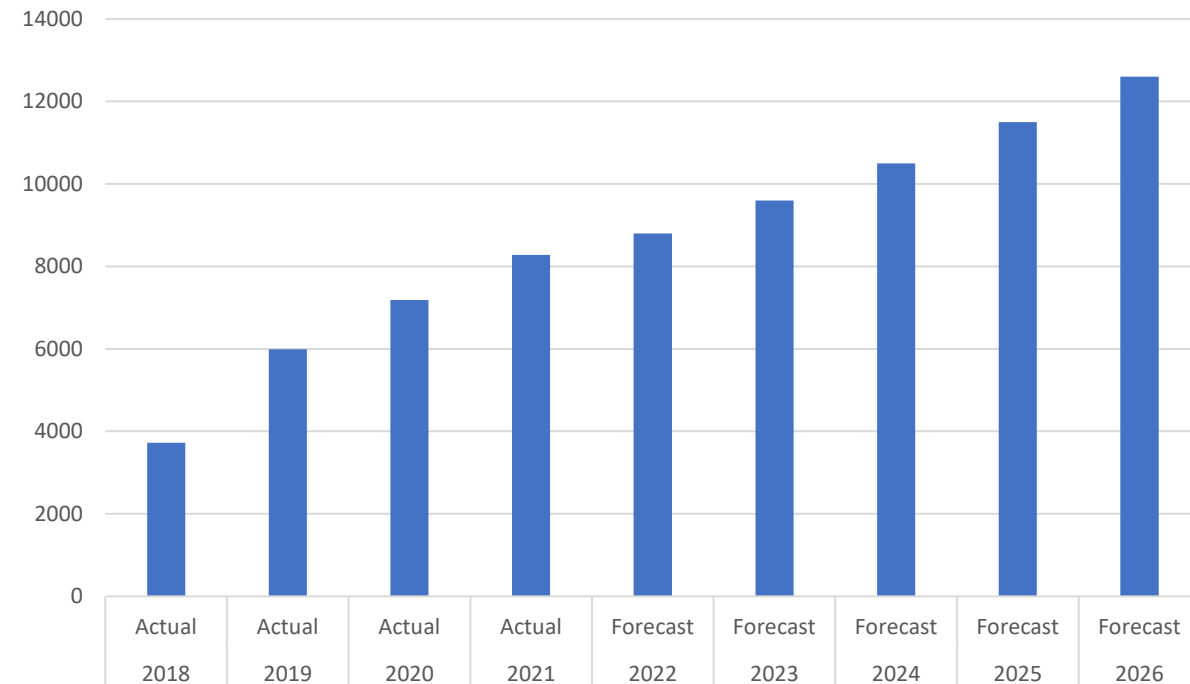
Recognize More Customers

Corp. Comms & Engagement Measures

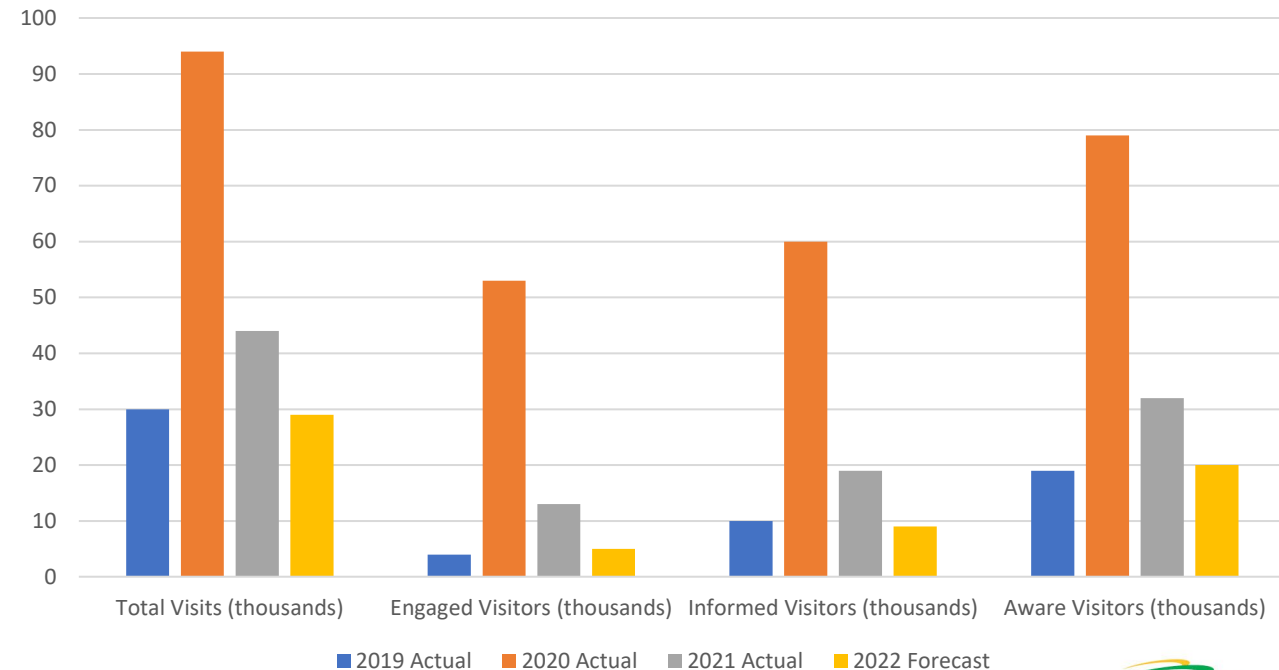


More engaged residents = Better feedback

Registered Users on
getinvolvedburlington.ca



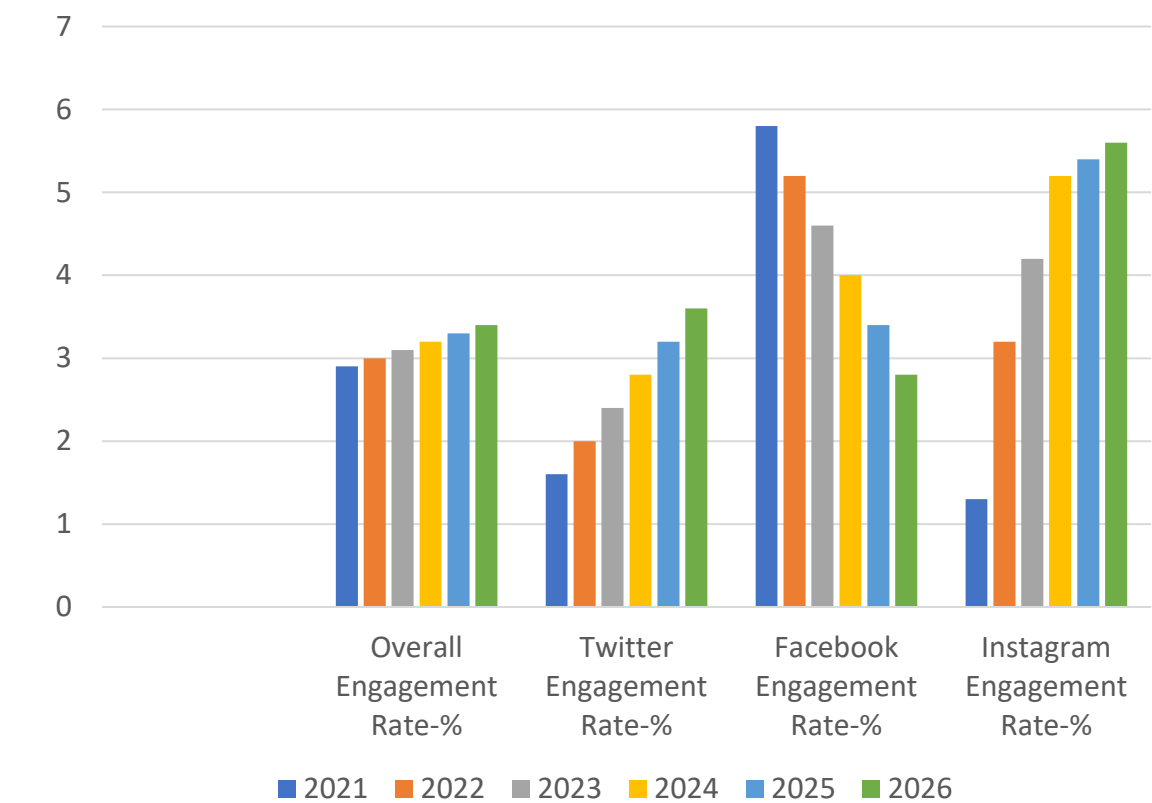
Get Involved Burlington Site



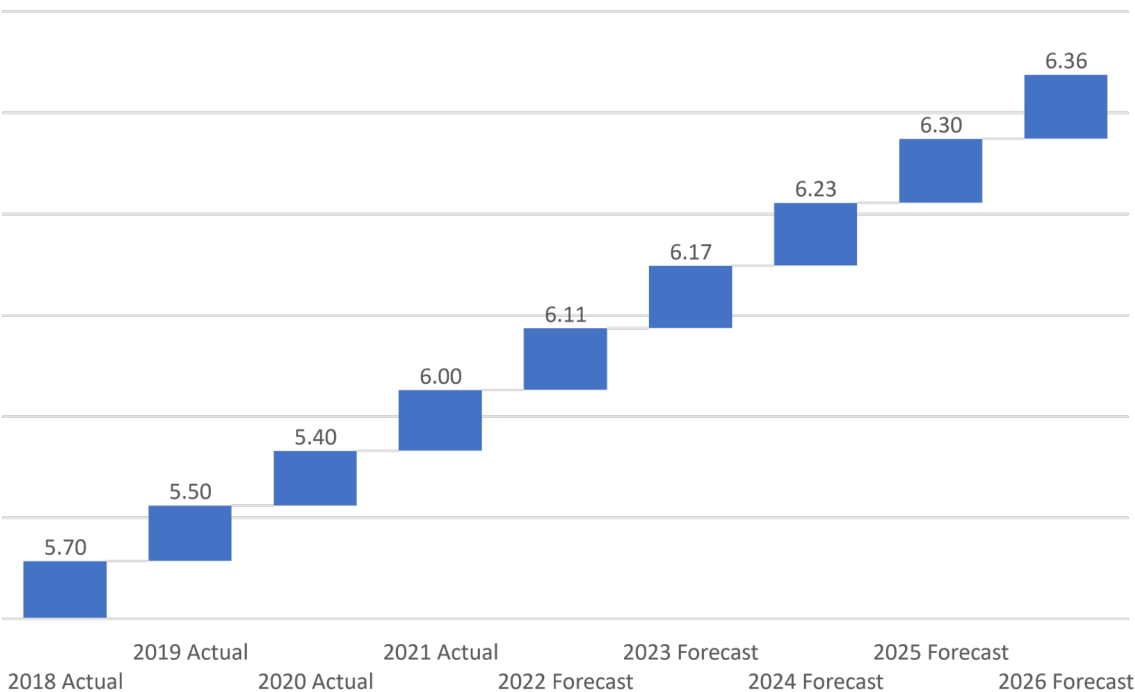
Corp. Comms & Engagement Measures



Social Media Engagement Rate



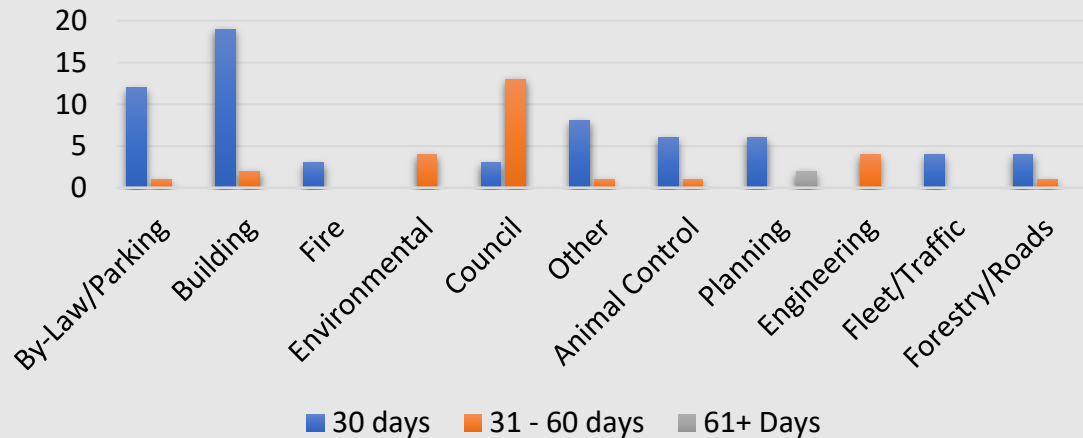
of Web Pages Viewed (millions) Burlington.ca



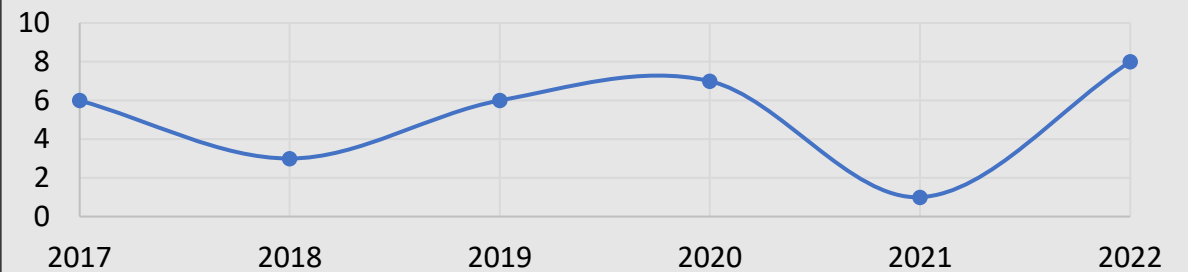


Access to Information Headline Measures

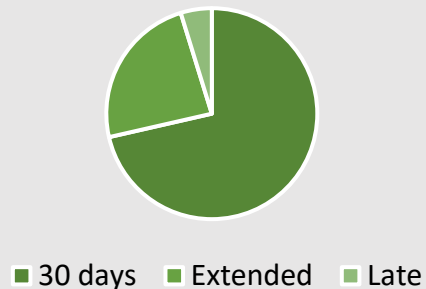
2022 YTD FOI Subjects



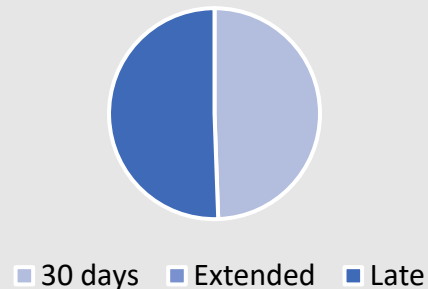
Privacy Breaches 2017 – YTD 2022



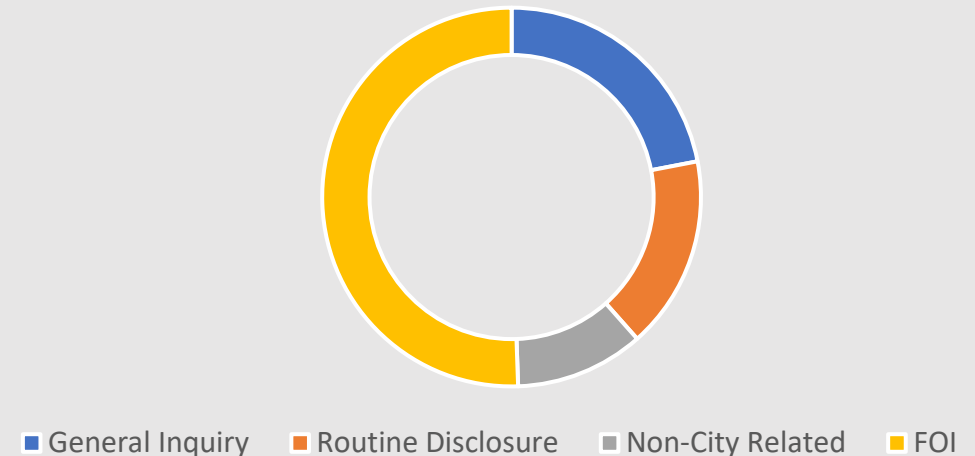
2022 YTD FOI Compliance



2021 FOI Compliance



FOIs Processed



Future Service Goals and Objectives

Opportunities

- Enhance engagement activities, stakeholder mapping and opportunities
- More targeted engagement with smaller, diverse groups and short duration
- Further implementation of CRM and contact centre partnerships
- New Service Burlington space at City Hall
- Voice of the Customer
- Data analysis, reporting and sharing CX insights

Industry Trends

- Digital Citizen: Improving service delivery with a unique digital identity for individual customers
- Digital Customer Experience in online spaces
- Internal communications tools/tactics, standards and people leadership for a hybrid workforce
- Value of human to human connections in real time
- Human-Centred Design

Service Information Session

2023-2024 Initiatives



Service	Key Initiative	Year
Corp. Comms & Engagement/CX	<ul style="list-style-type: none">• Ongoing website and online customer enhancements• Recommendations based on KPMG report options	2023-2024
Corp. Communications & Engagement	<ul style="list-style-type: none">• Focused resource(s) on internal communication needs in a hybrid environment: develop standalone internal communications plan, update internal communications tool.	2023
Corp. Communications & Engagement	<ul style="list-style-type: none">• Use of targeted engagement with smaller groups and short duration	2023
All	<ul style="list-style-type: none">• Collaborate as the new Community Relations and Engagement team• Combined Stakeholder mapping and customer persona development	2023

Service Information Session

2023-2024 Initiatives



Service	Key Initiative	Year
Customer Experience	<ul style="list-style-type: none">• Service Burlington for Animal Services and By-law Enforcement• CX education courses for City staff• Privacy Impact Assessment for CRM• Executive level CX dashboards	2023-2024
Legislated Services	<ul style="list-style-type: none">• Further Implementation of Information Management Strategy• Procedure By-law Review• Expansion of Digital Signature Program and Organizational Policy• Electronic Creation and Distribution of Closed Session Agendas• Advisory Committee Review creation of a Common Framework• 2022 Election Review and Report to Council• Lobbyist Registry Pilot Project Review and Report• Ward Boundary Review (initial phases)	2023 2023-2024

Service
Investment

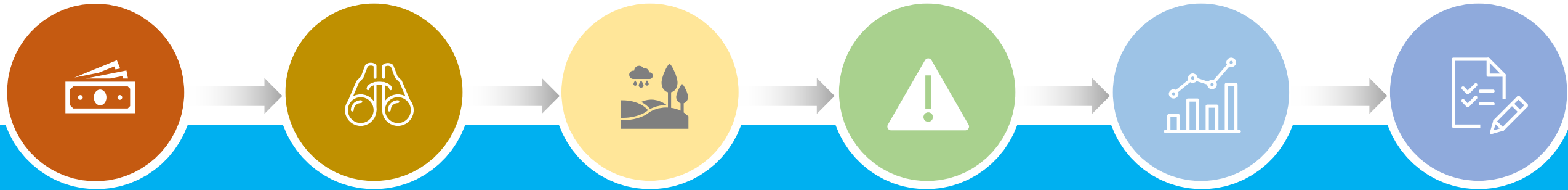
Current Service
Delivery

Asset
Investment

Service Delivery
Risks

Key
Performance
Indicators

Service Goals
and Objectives



Key Messages:

- **Continued investments** are needed to fully execute the Customer Experience Strategy & Implementation Plan, the Strategic Communications, Engagement & Marketing Plan and Information Management Strategy
- **Integration and coordination** of customer facing technology with great enterprise architecture is essential to provide outstanding, enhanced experiences online and in person
- **Culture change** is ongoing and evolving to achieve City-wide success in customer experience, engagement, good governance, information management and privacy
- Looking forward to our **future work together** as Community Relations and Engagement
- We **celebrate success** and embrace challenges

Questions and Discussion



Service Information Workshop

Day 4 Session 8

December 15, 2022



Agenda



- Service Investment



- Current Service Delivery



- Asset Investment



- Service Delivery Risks



- KPIs



- Service Goals and Objectives

Good Governance & Enabling Services (Part 2)

Internal Audit

Corporate Strategy

Corporate Legal

Financial
Management

Human Resources

Information Technology



Who Are we?

Internal services provide foundational support across the entire organization. Our services, innovations and transformations impact our community as they enable the public facing services to directly deliver to our residents.



Service Information Workshop

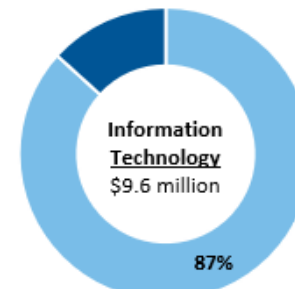
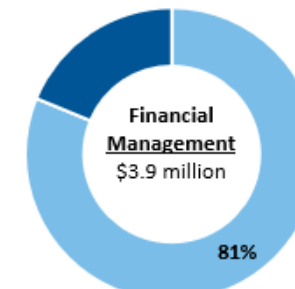
Service Investment

Operating Investment
Including One time COVID Impacts

Services	2022 Approved						
	Total Expenses	Total Revenues	Net Budget	% Of Tax Levy	Full Time FTE	Part Time FTE	Total FTE
Internal Audit	\$ 233	\$ -	\$ 233	0.12%	1.0	0.0	1.0
Corporate Strategy	\$ 1,775	\$ -	\$ 1,775	0.95%	7.0	0.0	7.0
Corporate Legal	\$ 2,295	\$ (398)	\$ 1,898	1.01%	14.0	0.0	14.0
Financial Management	\$ 4,760	\$ (894)	\$ 3,866	2.06%	37.0	0.0	37.0
Human Resources	\$ 3,189	\$ (155)	\$ 3,034	1.62%	17.0	1.6	18.6
Information Technology	\$ 11,142	\$ (1,480)	\$ 9,663	5.16%	40.0	1.5	41.5
Total Good Governance	\$ 23,396	\$ (2,927)	\$ 20,469	10.93%	116.0	3.1	119.1

Numbers are in \$ Thousands and may not add due to rounding

Percentage of 2022 Operating Investment Funded by Property Taxes



■ Net Property Tax Supported
■ Other Revenues and Recoveries



Key Service Priorities



ENHANCING OUR SERVICES

Improving our customer's experience through our collective services

- Opening the Digital Window
- Implementing Continuous Improvement Strategy
- Attracting and retaining Human Capital
- Proactive cyber security protection
- Modernizing financial and human capital management systems and processes



ENVISIONING THE FUTURE

Transforming our services to achieve our aspirational goals

- Designing & defining the Future of Work within our People Strategy
- Leveraging Digital Transformation
- Updating Burlington's vision for tomorrow: Vision 2050 and V2F 2022-2026
- Refining Multi-year Community Investment Plan
- Maintaining Multi-year Capital and Operating Tax simulation



SUPPORTING GOOD GOVERNANCE

Informing and advising council and staff to support effective decision-making

- Supporting Multi-platform advocacy and government relations
- Providing Professional legal advice and counsel
- Performing Independent and objective internal and external audits
- Ensuring Strong financial management and monitoring
- Unlocking data as an asset



Recent Continuous Improvements

Service	Accomplishment	Outcome
Finance	<ul style="list-style-type: none">• Updated Procurement bylaw• Updated Development Charges bylaw, park dedication bylaw, and developed Community Benefits Strategy unexpectedly mandated by Province through Bill 108• Introduction of multi-year community investment plan	<ul style="list-style-type: none">= Ethical, accountable fair, open and transparent procurement practices= Growth pays for growth= Establishing a foundation for multi-year outlook of financing needs for major community investment opportunities for strategic consideration by Council
Legal	<ul style="list-style-type: none">• Developed insurance portfolio KPIs• Implemented system to monitor/invoice/renew land related agreements• Moved to concept of shared office space to facilitate hybrid work	<ul style="list-style-type: none">= enhanced tracking performance and trends= more efficient tracking and timely renewals= support employees work-life harmony and more effective use of space
Human Resources	<ul style="list-style-type: none">• Developed a multi-year compensation approach• Launched Health and Safety portal for supervisors• Introduced training for senior leadership in Diversity, Equity and Inclusion• Completed corporate-wide Culture Survey• Workday configuration review	<ul style="list-style-type: none">= to provide the foundation for attraction and retention initiatives= using data to identify trends and develop mitigation strategies= enhanced understanding of how leadership behaviours influence staff= identify trends and develop approaches for continuous improvement= streamlined and updated policies and processes



Recent Continuous Improvements

Service	Accomplishment	Outcome
Corporate Strategy and Risk	<ul style="list-style-type: none">• Embedded change management into project management and corporate change initiatives• Implementation of Continuous Improvement strategy• Delivery of Risk to Strategy program	<ul style="list-style-type: none">= greater likelihood of successful implementation and adoption of new approaches= influencing independent staff capability for leading process and service delivery improvements= understanding of barriers to achieving aspirational goals and anchoring responsibility for monitoring of risks
Information Technology Service	<ul style="list-style-type: none">• Wholistic review and documenting of technology landscape in preparation for software application rationalization• Introduction of enterprise architecture practice• Educated staff and supported experimentation in alternative service delivery through human centered design and agile implementation• Enhanced infrastructure and security supporting remote workers and virtualization of meetings	<ul style="list-style-type: none">= Reuse of investments and greater cost control.= Integration of systems for reuse, strategic investments, unlocking data for predictive analysis and decision making, reduce duplication, cost control.= Build solutions that work for and are embraced by residents/end users, more timely response to emerging policy needs, greater engagement.= Continuous improvement in protection of City's computer systems reducing cybersecurity risk, enabling productivity and engagement.
Internal Audit	<ul style="list-style-type: none">• Updated and refreshed the Internal Audit Manual and Inherent Risk Assessment methodology• Signed agreement with Deloitte to perform quality assurance services for City Auditor's working papers	<ul style="list-style-type: none">= Improves the quality of internal auditing and conforms with international professional standards= Improves the quality of internal auditing and increases accountability over Office of the City Auditor



Assets Supporting Service Delivery



142

Insured city assets
(insured value of \$504m)



211 (↑ 21)***

Software Applications
(Many Cloud)



1,317

Desktops/Laptops (↑10%)*

242

Physical/Virtual Servers




570

Mobile Devices

550

Desk Phones (↓ 37%)*



managing

12TB

↑ 39% structured data**

38.8TB

↑ 30% unstructured data**

7.06TB 0365

↑ 1TB Last 6 months / 28% YGR

* = Since 2019 / ** = Since 2018 / *** = Since 2021

Recent Asset Investments

Capital Project Highlights



Current Service Delivery Risks

Risks – External Source

- **Speed & breadth of legislative changes:**
 - Creates organizational and strategic planning instability & uncertainty
 - Increased legal cost & uncertainty of outcomes
 - Financial exposure as no longer seeing growth pay for growth
- **Competition for talent - attracting qualified candidates:**
 - Corporate-wide staff turnover
 - Duplication of effort in re-posting
 - Extended timelines to fill vacancies and downstream impact on staff filling gaps
 - Negative impact on HR service capacity

Risks – Internal Source

- **Accelerated pace & scope of change:**
 - Unsustainable strain on the organization's capacity
 - Overwhelming the organization's culture
 - Inability to meet expectations of community given breadth of pressures
 - Only focusing on the "here and now" no chance to think strategically
- **Unstructured Enterprise Architecture:**
 - Increased cost to maintain technology sprawl
 - Incompatibility of technologies
 - Inability to leverage technology and business investments

Risk to Achieving Our Objectives

- Replenishing Reserves & Reserve Fund balances to meet approved targets and create financial stability and flexibility
- Uncertain economic conditions, increasing interest rate environment impacts cash flows, and increases the cost of debt
- Uncertain staffing landscape to meet service levels.
- Change in other levels of government legislation and/or policy creating a disconnect to current city goals and objectives
- A lack of enterprise and collaborative processes to strategically prioritize and align projects/initiatives and plans.
- A shift in staff/leadership resulting in changes to decision making systems, processes, technology systems and business approaches

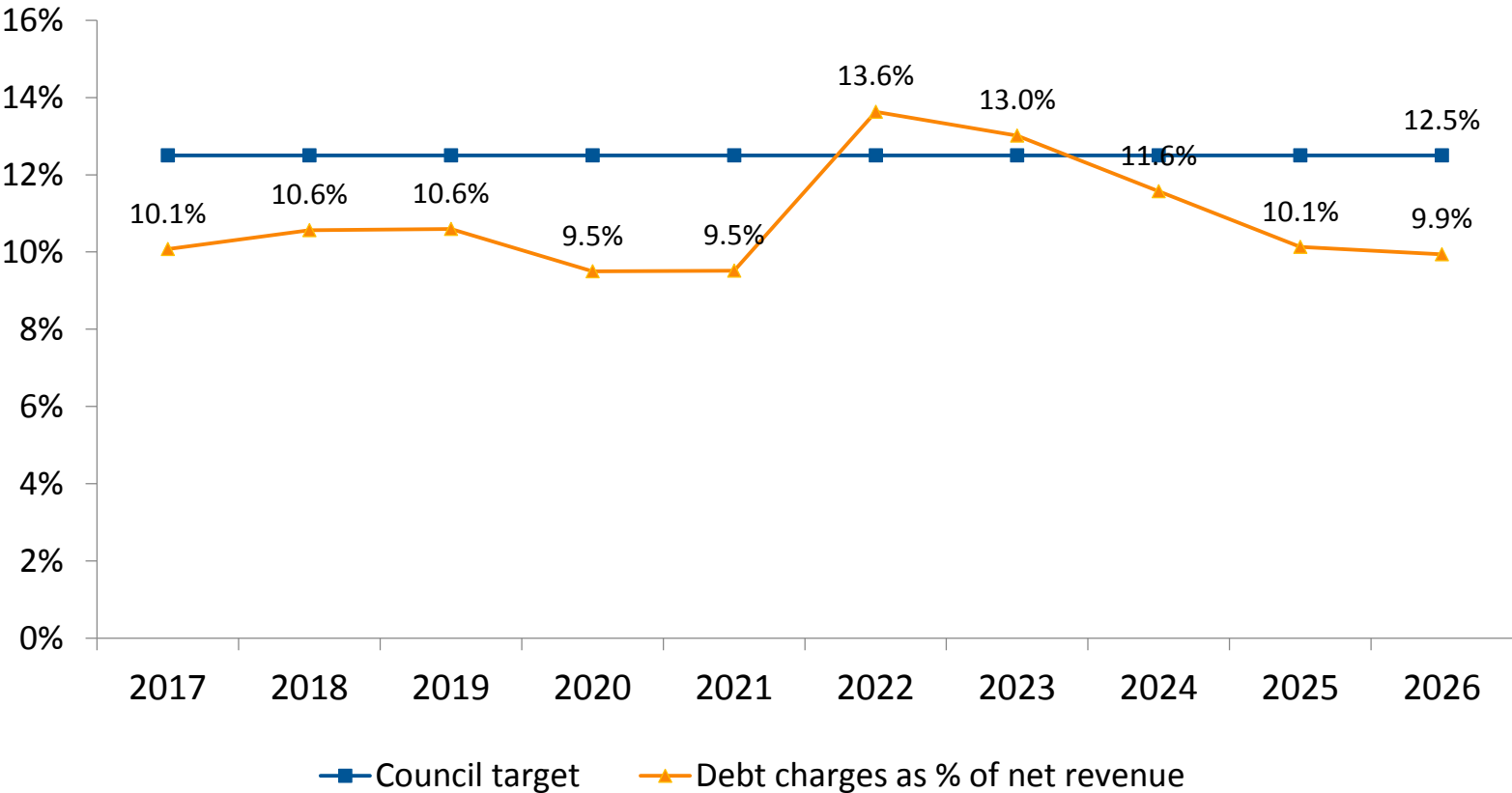
Key Performance Indicators



Envisioning the Future



Debt Charges as a Percent of Net Revenues

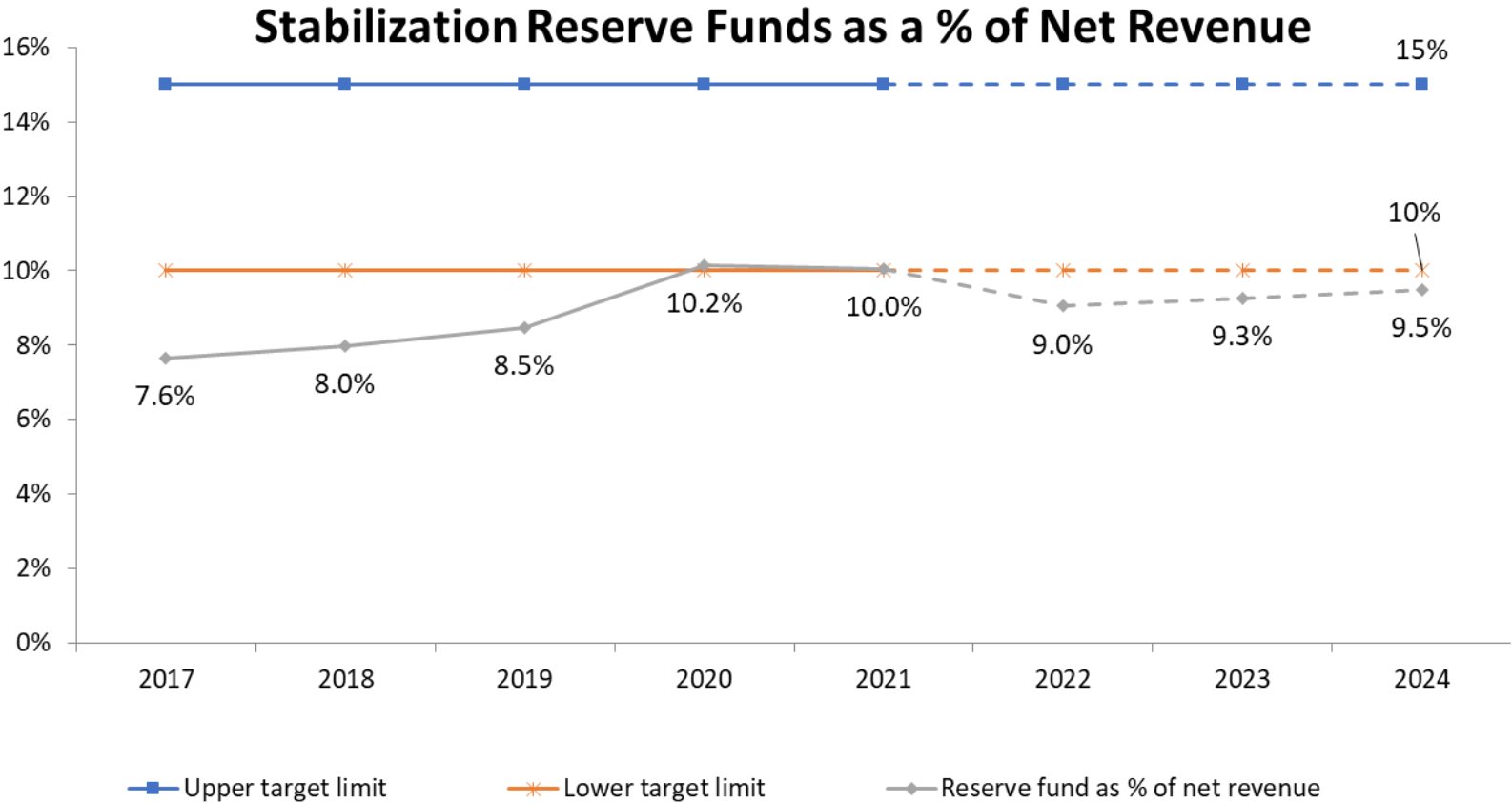


Forecast does not include strategic investment opportunities that may arise in the future and are not currently approved by Council.

Key Performance Indicators



Envisioning the Future



Stabilization reserve funds cushion the effect major expenses would otherwise have on tax rates in a given year.

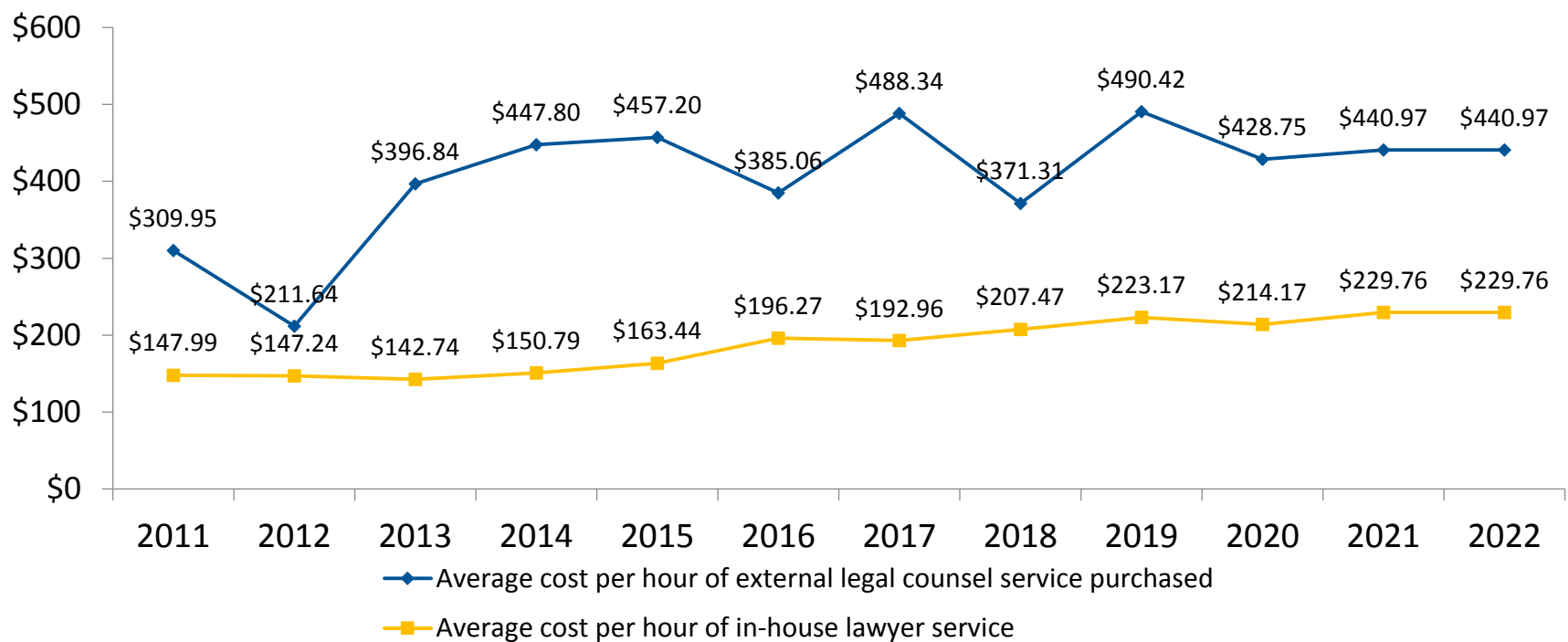


Key Performance Indicators



Supporting Good Governance

Average Cost per Hour of Legal Service (Internal vs. External)



While the cost per hour of external legal services is almost twice the cost per hour of internal legal services; the volume and specialized nature of the work requires the use of external legal services.



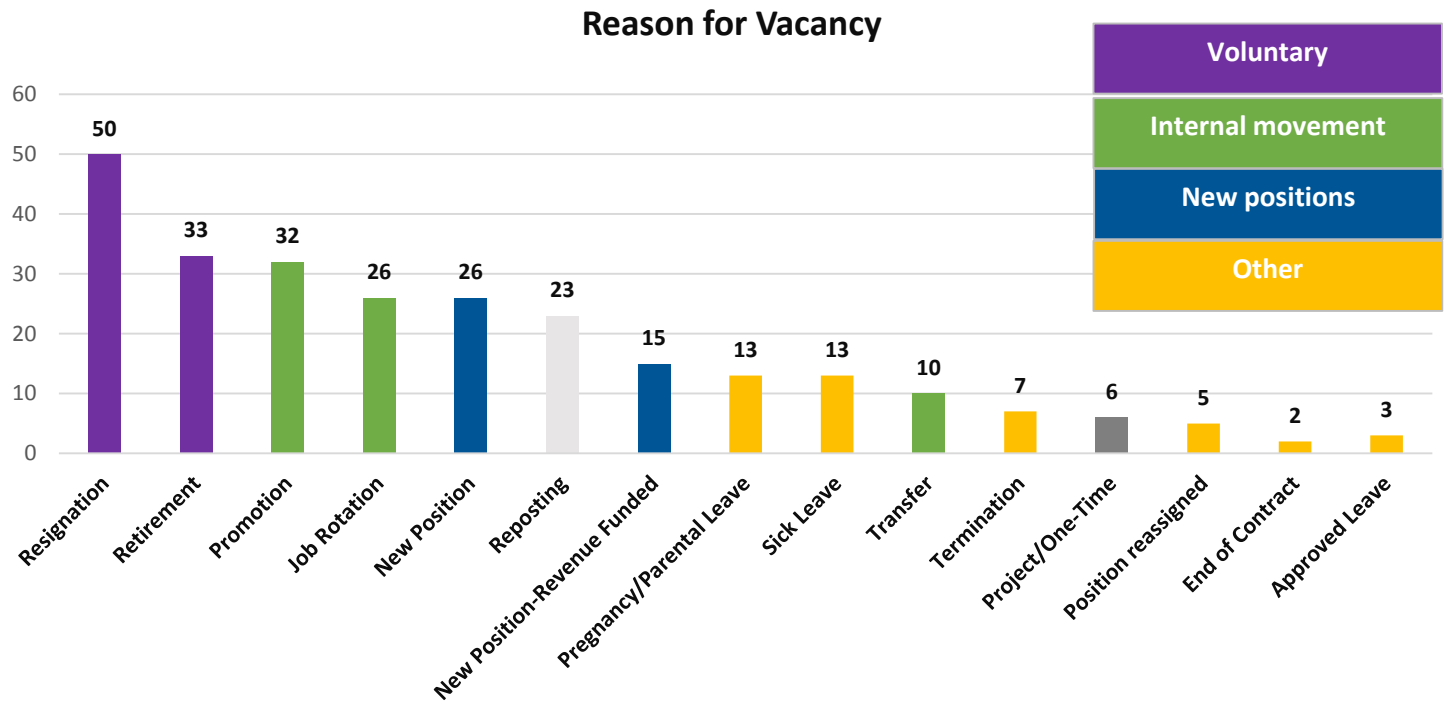
Key Performance Indicators



Enhancing Our Services

The City is experiencing significant difficulty attracting and retaining employees. This negatively impacts workload, people management, sick leave/LTD and our ability to provide services.

Data Collected from January 1, 2022 up to September 30, 2022



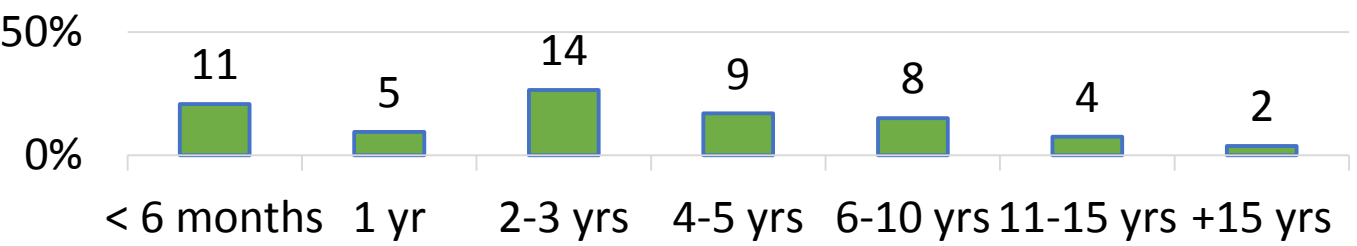


Key Performance Indicators

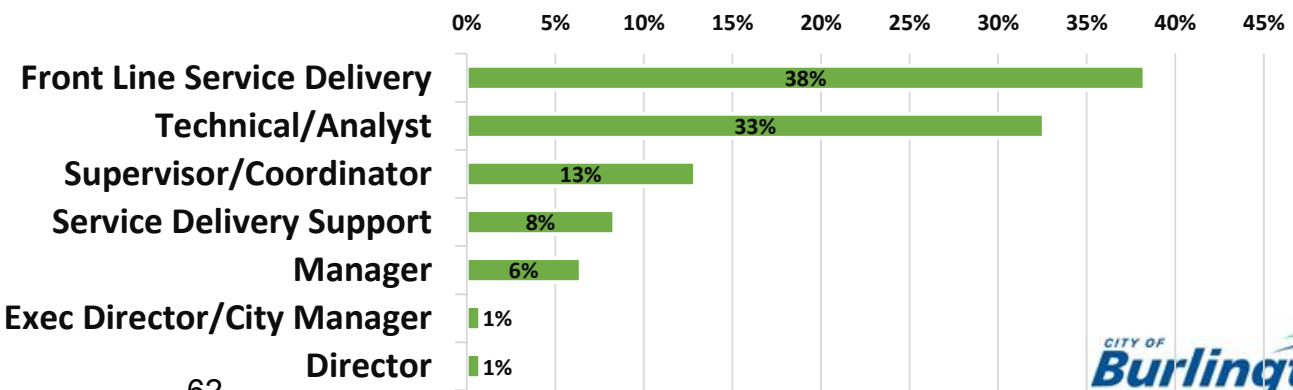


Enhancing Our Services

Years of Service of Full Time Staff Who Resigned



Vacancies by Employee Grouping



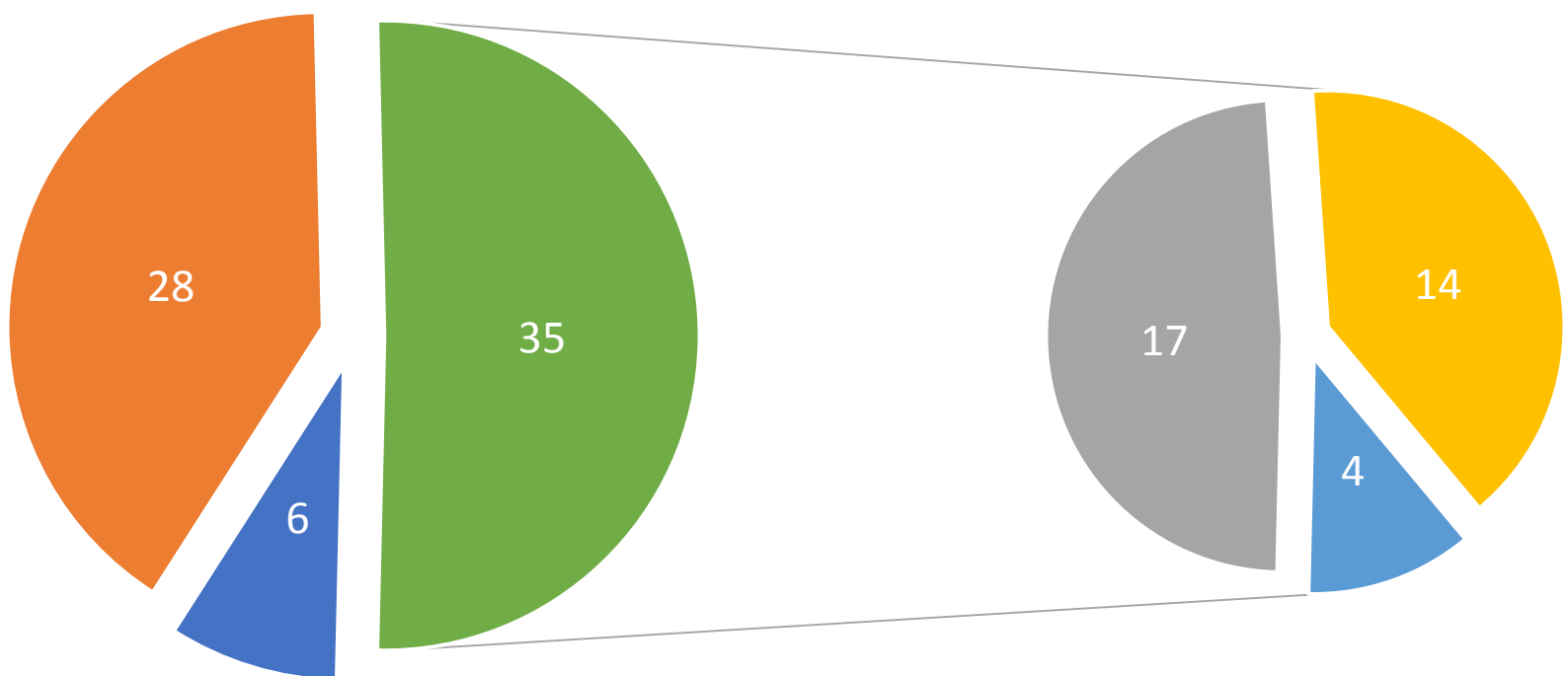


Key Performance Indicators



Envisioning the Future

Overall IT Project Portfolio



■ Backlog ■ Demand ■ New / Enhancements ■ Infrastructure Renewal ■ Transformative

The demand for technology to enable business outcomes has increased year over year increasing backlog. Prioritization will be essential to ensure that the priorities of the organization are being addressed and balance viability and feasibility.



Key Performance Indicators



Supporting Good Governance

Number of Phishing URLs in our	Over 570 (2021 – 4500) URLs are scanned daily, 1% (2021 – 6%) of all URLs are malicious
Web attack	On Average 193 (2021 – 250) attacks are blocked on a daily basis, 17% (2021 - 22%) are classified High or Critical severity
Security Awareness Training completion rates	Completion rate for 2019 89% Completion rate for 2020 86% Completion rate for 2021 65% Completion rate for 2022 67% (as of November)
Controls	New security measures implemented in the last 12 months = 11

Cybersecurity continues to be a key risk to the City requiring constant vigilance in monitoring and detecting threats. Investments over the past 2-3 years are showing benefits. Training is a concern.

Future Service Goals and Objectives

Opportunities

- Improved data governance, management and leveraging data analytics to support business decisions
- Implementation of Hybrid Workforce
- Enterprise business planning and portfolio management and prioritization
- Strategic land acquisition
- Build internal legal capacity for litigation (planning, insurance)

Industry Trends

- Insurance market hardening for municipalities
- Information as a strategic asset
- Digital Transformation - fundamentally changing how we operate and deliver services including support for our future of work
- Multi-Year Budgeting
- The competition for talent is “on”
- Increased provincial control/centralization in municipal matters
- National & international economic pressures

Service Information Workshop



2023-2027 Initiatives

Service	Key Initiative	Year
Finance, HR, ITS	Implementation of Workday	2023
Finance	Enhance Multi Year Simulation & Community Investment Plan	2024
Finance	Development Charges and Community Benefits Strategy Update	2024
Corporate Strategy & Risk	Vision to Focus: 2022-2026 – setting the 4-year council workplan	2023
	Enterprise Business Planning & Portfolio Management system & processes	2023
	Vision: 2050 Strategic Plan	2026
Human Resources	Completion of Job Evaluation Process	2023
	Performance Management System/Processes	2023-2024
	Diversity and Inclusivity Strategy	2024-2025
Legal	Fully Operationalize In-house insurance litigation function	2025
Digital Service (formerly ITS)	Transforming to Digital Service platforms, application rationalization, data strategy, advanced digital delivery practice including human centered design.	2023-2025

Service
Investment

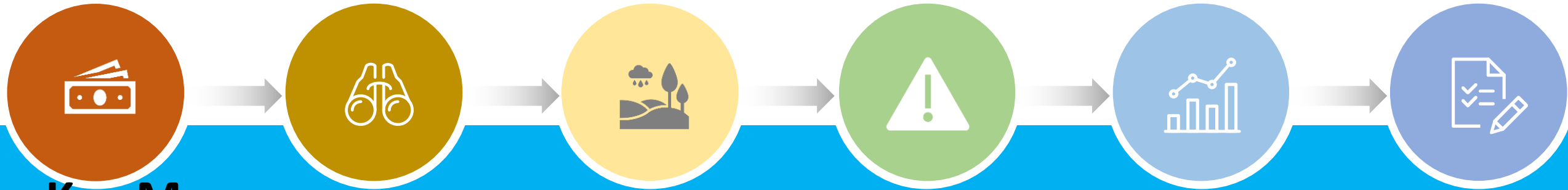
Current
Service
Delivery

Asset
Investment

Service
Delivery Risks

Key
Performance
Indicators

Service Goals
and
Objectives



Key Messages:

- Our services are fundamental to enabling and supporting the operations of the city to effectively deliver city services and accomplish objectives and goals.
- Municipal landscape is in a state of flux resulting from changes to key provincial legislation creates organizational, financial and strategic planning instability & uncertainty.
- Managing corporate risks requires sufficient investment to support the strategic directions and all city services.
- Encouraging and developing a culture of innovation allows us to take advantage of opportunities while recognizing the risks and managing priorities.
- Maintaining and increasing technology enablement and building staff competency to lead and adapt to change.

