



Final Report

Township of Ramara –
Service Delivery Review

September 2020



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Executive Summary

Overview of the Service Delivery Review

Project Context

The Township of Ramara engaged StrategyCorp to conduct a service delivery review in order to assess and identify improvement opportunities across the services offered to residents and its internal operations with a focus on infrastructure services and information management. The objectives of this review are to (1) identify services and service levels that best meet legislative and community needs; (2) improve service delivery through various means; (3) identify improved information technology and management processes; and (4) identify options to reduce operating costs while maintaining appropriate staffing levels.

Phase 2: Current State Assessment

In July 2020, StrategyCorp delivered the Current State Report, which represents the Current State Assessment. Key objectives for the phase include:

- Building a thorough understanding of current municipal services;
- Assessing weaknesses and threats facing Ramara; and
- Identifying potential improvement opportunities to be further explored in Phase 3.

Our approach to conducting the Current State Report utilized multiple sources of inputs and extensive engagement, including:

- Analyzing internal and external data to evaluate current operations;
- Benchmarking current performance and delivery models against peers;
- Conducting 14 interviews with elected officials, senior leadership, and staff;
- Facilitating a cross-functional workshop and focus groups; and
- Identifying initial high-impact improvement opportunities that could lead to cost-savings or revenue generation, efficiencies, or value-added services or operations.

Phase 3: Improvement Initiatives

Upon review of the Current State Report, StrategyCorp developed and analyzed the following three initiatives for Phase 3:

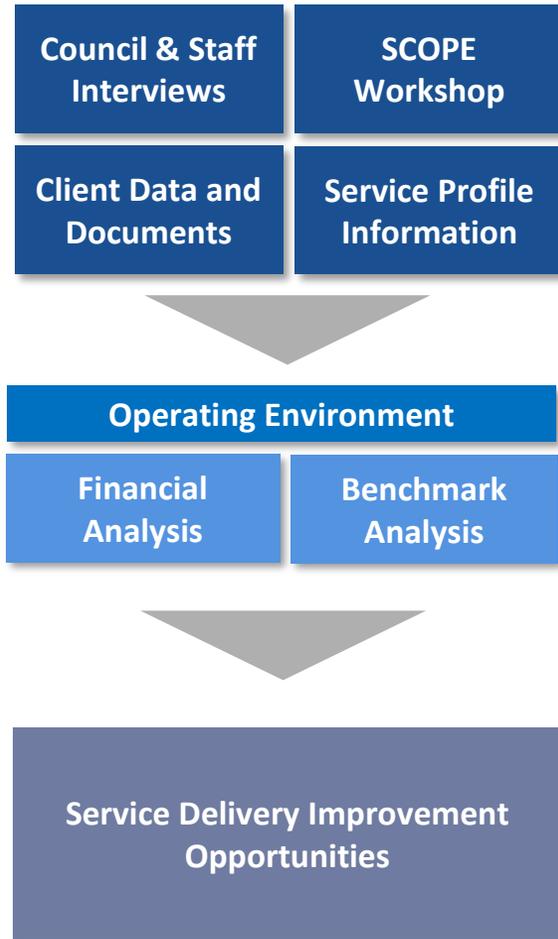
- **Information Technology and Information Management:** StrategyCorp conducted a staff survey on current IT uses and IM practices and identified improvement opportunities and productivity savings.
- **Fire and Rescue:** StrategyCorp conducted interviews with Fire and Rescue staff and a focus group with the volunteer captains; assessed service levels within this department; and identified recommendations for service improvement.
- **Recreation and Library:** StrategyCorp assessed programming and budgeting data; conducted interviews with recreation and library staff and a focus group with the Library Board; and presented an overview of three future scenarios.

Final Results

Based on our work through this Service Delivery Review, we have developed:

- Department profiles;
- An inventory of 29 high-impact improvement opportunities, both enterprise-wide and department specific;
- A detailed current state of Ramara's IT and IM capacity and a framework for improving these functions according to the Township's strategic plan (see Appendix A);
- An assessment of Ramara's service levels for Fire and Rescue and four service recommendations focused on increasing services, reducing costs, and generating revenue;
- A framework for setting a vision for recreation and library services and three future scenarios.

Review of the Current State Findings



Information gathered through existing data and documents, senior management team and Council interviews, and a workshop with staff informed the following high-level assessment of the Township, which further informed the improvement opportunities:

Using StrategyCorp's Municipal Operating Framework, the key takeaways were as follows:

- Strategy and Goals:** The administration has brainstormed new strategic priorities, and these should be formalized and expanded to include corporate-wide and department-specific initiatives. For example, there is a general interest in attracting growth to Ramara, but there is a lack of a specific, long-term vision on what Ramara could become.
- Services and Service Delivery:** There is general consensus among Council to prioritize “hard” services over services like recreation or library services. However, these priorities are not framed in a larger vision for the Township. Furthermore, for discretionary services, most departments lack service standards and performance management frameworks, which makes assessing service levels challenging—it should be noted that this is common among several small municipalities in Ontario. One clear service priority in the Township is customer service, and staff are working diligently to improve customer service in Ramara.
- Planning and Budgeting:** The Township is taking a more collaborative approach to priority setting and budgeting and should codify this approach to formalize it. The Township is proactive in improving long-term capital planning with the development of the new Asset Management Policy.
- Operations and Policies:** Ramara uses several digital tools to deliver services and improve operations. A formalized IT/IM Master Plan and architecture that (1) matches service and operational needs and (2) includes enhanced training may help staff better understand how these tools can be more effectively utilized. Additionally, information management is not uniform across departments. Staff within departments know their policies and procedures, but cross-departmental information sharing is challenging and leads to significant time lost.
- People and Culture:** Ramara's staffing levels are in line with peers, but the Township spends more on contracted services. Contracted services can be more cost-effective, but Ramara should ensure current staffing levels and contracted services align with service needs. Ramara could better cross-train staff to fill roles when needed and improve succession planning. Overall, Ramara is breaking down siloes between departments to support more collaboration and whole-of-organization approaches.
- Assets:** Ramara is taking tangible steps to improve asset management and capital planning through the new GIS position and the development of the new Asset Management Policy. Service level reviews may uncover opportunities for Ramara to share assets with other communities or to charge other communities for asset use.

Ramara's Financial State and Peer Analysis



Financial Overview

- **Ramara is trending towards financial health and sustainability and is building up reserves at a high rate while reducing debt.** Ramara has been intentional about building savings into its budget, which is supported by its policy that each department may put their surplus funds into their reserve, so they have an incentive to save. The Treasurer is working to analyze each department's ten-year capital plans so that costs may be "smoothed over" into the tax rate. It was noted that Ramara is planning to develop a reserve policy to align with capital funding need.
- **Ramara is meeting nearly all of Ministry of Municipal Affairs and Housing (MMAH) targets for key financial indicators and is trending in positive directions.**
- **Ramara's capital spending has fluctuated over time, but the administration is taking steps to improve capital planning and financing along with the development of its Asset Management Policy.**
- **In addition to budgeting for FIR reporting, Ramara should implement budgeting methods that are aligned with services/subservices to better understand service-level costs.**



Peer Comparisons

- **Though Ramara is hitting nearly all MMAH's targets for key performance indicators, it is slightly behind its peers .** This phenomenon is partly caused by policy differences among the municipalities.
- **Ramara receives less revenue from other municipalities compared to its Simcoe Peers and receives less in government transfers compared to peers.** Ramara has many mutual and automatic aid agreements, and it should ensure equal reciprocity with these agreements or find opportunities to be a service provider. Furthermore, while Ramara's Ontario Municipal Partnership Fund (OMPF) grants are set by a formula, its other grant funding has fluctuated over a 10-year period.
- **Ramara has similar staffing levels but spends more on contracting compared to its peers.** Contracted services can be cost-effective, but a service level review may help Ramara ensure that staffing and contracted services appropriately meet service needs and strategic priorities.
- **Ramara's debt sustainability is in line with peers.**
- **Ramara has more fire and rescue assets than peers, but it also offers more specialized services given its long lakeshore.**
- **Ramara has lower revenue from development charges.**

Summary of Current State Recommendations

After uncovering the areas of improvement through the current state analysis, the administration noted that many of the improvement initiatives are underway. This suggests that the administration has a good understanding of its areas of improvement. Implementing these improvements, along with the recommendations identified in Phase 3 will bring Ramara into good, municipal operating health.

Initiatives Underway

- Opportunity 1: Revamped strategic plan
- Opportunity 3: Customer-centric service-levels
- Opportunity 4: Develop a reserve policy
- Opportunity 5: Realign budget
- Opportunity 7: Standardize procurement policies
- Opportunity 9: Develop a human resources strategy
- Opportunity 10: Infrastructure and Finance oversee AMP
- Opportunity 11: Develop communications master plan
- Opportunity 12: Economic development strategy
- Opportunity 13: Part-time grants coordinator
- Opportunity 15: Customer care policy
- Opportunity 16: Codify collaborative budgeting
- Opportunity 17: Review recreation services
- Opportunity 20: Improve work order process
- Opportunity 21: Utilize synergies between Building & Planning Depts.
- Opportunity 29: Review library services

New Initiatives

- Opportunity 2: Service inventory and KPIs
- Opportunity 6: Enterprise-wide IT strategy
- Opportunity 8: Review contracts and staffing levels
- Opportunity 14: Online financial services
- Opportunity 18: More services through Ramara Centre
- Opportunity 19: Online bylaw portal and complaint
- Opportunity 22: Digital infrastructure tools
- Opportunity 23: Digital planning tools
- Opportunity 24: Township growth plan
- Opportunity 25: Review mutual and automatic aid
- Opportunity 26: Review fire fleet size
- Opportunity 27: Review fire service levels
- Opportunity 28: Digital tools for Fire and Rescue

Phase 3 Initiatives



Information Technology/Information Management



Fire and Rescue



Recreation and Library

Summary of Findings

By advancing on the following three initiatives, Ramara would effectively improve service delivery across the organization and realize cost and productivity savings. In combination with effort already underway, Ramara would make significant progress against its strategic priorities.

	 Information Technology (IT) & Information Management (IM)	 Fire & Rescue Services	 Recreation & Library
Key Findings	<ul style="list-style-type: none"> Staff lose, on average, 3 hours per week searching for information that is not easily found. Staff are not held accountable for implementing strong IM practices and fully utilizing digital tools. The Township lacks a single resource tasked with leading digital transformation initiatives. 	<ul style="list-style-type: none"> Currently, Ramara is under-serving the community in two services, meeting community needs in four services, and over-servicing in one service. One service was unable to be assessed. Mutual and automatic aid responses make up a small proportion of its calls, but true reciprocity cannot be analyzed due to data limitations. 	<ul style="list-style-type: none"> Recreation and library programming has less duplication than was anticipated. Ramara spends less on recreation and library compared to peers.
Summary of Recommendations	<ul style="list-style-type: none"> 7 quick wins in IT/IM (Slides 13-14) 16 strategic IT/IM recommendations (Slide 16) Sequence decision-making on IT/IM 	<ol style="list-style-type: none"> Continue to provide ice and water rescue services Reduce HazMat response and do not replace technical gear Introduce burn permits Hire a Fire Prevention Officer 	<ul style="list-style-type: none"> Ramara should allocate at least 5% of its budget towards recreation and library services.
Ramara's Strategic Plan	<ul style="list-style-type: none"> The IT/IM recommendations identified in this report align to all four of Ramara's strategic priorities. 	<p>Operations and services that are defined, prioritized, and sustained: This review provides Ramara an assessment of its service levels and specific service-level recommendations to better meet community needs.</p>	<p>Growth is promoted, planned, and fostered: Growth is a strategic priority for Ramara, and investing and recreation and library services can help support growth to the Township.</p>
Budgeting Considerations	<p>Current IT costs: \$93,800 (many of the more expensive tools can be better optimized)</p> <p>Productivity savings: ~ \$404,710 (1.7% of Ramara's 2020 Budget)</p>	<p>New costs: \$825,000 by 2025 for asset replacement assuming no cost recovery</p> <p>Savings: \$21,000 by 2025</p> <p>New revenue: \$375,000 by 2025</p>	<p>New costs: \$0.00.</p> <p>\$350,000 in cuts (1.4% of Budget) will need to be made in other departments to accommodate additional funding for recreation and library services if Council does not want to increase the municipal levy or reduce its surplus.</p>



Information Technology and Information Management

Initiative Overview

Description

Information technology (IT) and information management (IM) are two high priorities for the Township as it aims to become a more digitally-enabled and data-driven organization that promotes collaboration across departments. Through this review, StrategyCorp conducted a staff survey on current IT uses and IM processes and related pain points and discussed recommendations for improvements. The purpose of this survey was to not only identify high-impact opportunities, but also assess the scope of the problems by asking staff to estimate time lost on processes that could be improved through digital tools and searching for information that is not easily found. StrategyCorp made a number of assumptions in order to project productivity savings from the staff survey. Please see *Appendix A* for the complete findings from the staff survey and StrategyCorp’s assumptions. The purpose of this exercise is to primarily demonstrate the scale of the challenges and identify the need for IT and IM improvements.

As was noted through the current state phase, Ramara needs to formalize its strategic plan before it can develop an IT/IM Master Plan. In the absence of an IT/IM Master Plan, StrategyCorp has mapped out recommendations against the current draft strategic plan to demonstrate how the recommendations identified can help advance Ramara’s strategic goals. There are a few recommendations that require sequenced decision-making as the decision for one recommendation will impact the decision for others.

Recommendations

- 1 7 quick wins, as outlined on Slides 13-14
- 2 16 IT and IM improvement opportunities as part of the strategic plan, as outlined on Slide 16
- 3 Sequence decision-making for several IT/IM improvements, as outlined on Slides 22-23

Financial Impact

Financial Summary	
Current IT Costs	\$92,000.00
Productivity Savings from IT Recommendations	~\$260,000.00
Productivity Savings from IM Recommendations	~\$144,710.00
Total Productivity Savings	\$404,710.00

Ramara is in a transition phase for IT and IM

Background on Ramara's Information Technology (IT) and Information Management (IM)

In recent years, Ramara has taken small steps to become a more data-driven organization that uses digital tools to streamline services and processes and to promote information sharing, and the administration has elevated improvements in IT and IM to high priority areas for the Corporation. A key step was entering into a contract with Simcoe County for IT services in 2018, which includes a variety of standard IT services (e.g. network administration, hardware and software support, servers, maintenance, etc.). Additionally, the Township has purchased more digital tools to streamline operations and improve information management. Managers noted that they have been using digital tools more effectively, such as the use of Keystone and Citywide for asset management, building, and planning.

As part of this digital transformation, Ramara wants to place a high priority on data collection, information management, and information sharing to not only streamline day-to-day operations, but also use that data to inform strategic decision-making.

Throughout the current state assessment, StrategyCorp uncovered the following challenges for IT and IM in the Township. These challenges will need to be addressed as part of the transition to a digitally-enabled municipality.

Information Technology and Information Management Challenges

- **Digitization of Paper and Processes** – Most work is still done and stored in hard copies. Manual collection of paperwork (reporting, accounts, approvals, etc.) often includes driving paperwork around to acquire proper signatures, and many departments have to then transfer paper-based information to Excel spreadsheets. For records, this also means documents or records can take a lengthy amount of time to locate, are not shared with the Records and Information Coordinators, or have simply been lost in chains of custody or within the filing system. Asset management records and bylaws appear to be the two areas with the most challenges in record keeping, which has led to duplication of and some contradictions in bylaws.
- **Digital Service Delivery** – There is a strong desire to move towards digital service delivery in the Township. Staff noted that many of the Township's residents would not utilize online functions at this time due to limited internet connectivity, so in-person services should still be available. However, there are several services (e.g. online payments and tax bill look-up) that would improve services for residents. As part of its recent effort to introduce more digital tools to the Township, Ramara is implementing software tools to support its services and internal functions, but there are a variety of tools that are not used consistently across departments. The Township needs clearer goals and a framework around digital service delivery and digital internal tools.
- **Technology Integration and Change Management** – Some departments have begun successfully integrating technology and software into data collection and record keeping (Keystone, iCompass, Citywide, etc.) but its use is not universal across the administration or even within the departments using them. Additionally, there is inconsistency in records maintenance across departments. Staff noted that information can be found easily within departments but locating information across departments is time-consuming and requires staff support. For example, many departments use the T: Drive, but having their own methods for organizing information, many do not keep the Records and Information Coordinator sufficiently informed about records to be managed. Some of the contributing factors for a lack of consistency were:
 - Lack of training on new technology software and processes for information management;
 - Lack of interest from staff in incorporating new technology and software and practicing strong records management practices due to the time and money constraints; and
 - Lack of cross departmental alignment on technology and processes, which was the frequently reported as the common reason.

Ramara's suite of digital tools cost over \$90k per year

Ramara is increasingly using more digital tools, but it still uses free versions of critical software (e.g. OSTicket and SentryFile), and staff often receive tools through one-off requests. For example, the Infrastructure Department has a subscription to Evernote for note-taking and collaboration, but no other department uses it despite the stated need. Or, Legislative and Community Services uses a free version of Slack for instant messaging, and other departments could also benefit from an internal instant messaging function.

Tool	Use	Cost
 ACE	Tracks fleet use	\$1,600.00
 ADP	Timecard and payroll management	\$9,000.00
 adtronics®	Programs LED signboards	N/A
 ArcGIS®	GIS program (County-owned)	\$0.00
 BrightSign®	Programs TV communications in Town Hall foyer	N/A
 CITYWIDE SOFTWARE	Asset management and budget software	\$6,600.00
 CISys	Manages emergency call data	\$1,800.00
 Entrust Datacard®	Creates access cards for Township staff	N/A
 eSolutionsGroup	Website publisher	\$9,500.00
 everbridge®	Emergency notification	\$7,600.00
 Evernote	Collaborative list tracking and note-taking	\$600.00
 EyeCloud VIDEO SURVEILLANCE	Video surveillance	\$400.00
 FFRS	Emergency dispatch backup	\$0.00
 HOST COMPLIANCE	Compile lists of short-term rentals	\$15,000.00

Tool	Use	Cost
 HRdownloads®	Human resources support—policy development, training, etc.	\$12,000.00
 iCompass	Council agendas and reports	\$9,200
 Keystone	Municipal financial management and information management	\$12,000.00
 Lucidpress	Communications design and publishing	N/A
 MaxGalaxy™	Recreation program management	\$4,400.00
 MetroCount® Traffic Data Specialists	Traffic data collection	\$0.00
 OSTicket	Work order management and resident complaint tracking	\$0.00
 PHOENIX SIG	Fuel use tracking and management	N/A
 SENTRYFILE Document Management	Records management	\$0.00
 slack	Instant messaging	\$0.00
 Street on cloud	Resident speed compliance	\$0.00
 TABQUIK®	Creating paper file labeling	\$600.00
 zoom	Host virtual meetings	\$3,500.00
Total IT software costs per year		\$93,800.00

Ramara can achieve quick wins while it develops an IT/IM Master Plan

Below and in the following slides, StrategyCorp provides an overview of IT/IM recommendations and associated productivity savings, taken from the staff survey. Please see Appendix A for the methodology and assumptions. Given the assumptions made, it should be noted that the purpose of these assumptions are to demonstrate the scope of issue.

Quick Wins		Rationale	Budget Considerations
1.	Conduct ADP training for all staff so that they can directly input time into the payroll system	ADP is a new timecard system that is slowly being implemented across the Township. Infrastructure and Fire and Rescue do not use it and transferring the timecards from paper to ADP is time consuming for the administrative assistant.	ADP: \$9,000/year Lost Productivity Dollars: \$8,300/year The Township spends \$9,000 per year on this software, and the administrative assistant for Infrastructure and Fire and Rescue spends 5 hours per week inputting time into the system. This equates to approximately \$8,300 “productivity dollars” per year.
2.	Staff training on iCompass	Directors are the primary staff members who use this tool, given that they draft departmental reports. It may be valuable to have more staff trained on it so that others can contribute to Council report drafting. Additionally, iCompass has capabilities that are not being used optimally, such as tracking action items from Council meetings so that departments understand work coming out of Council meetings.	iCompass: \$9,200/year Lost Productivity Dollars: \$6,650/year The Township spends \$9,200 per year on this software. One director noted that they spend 4 hours per week keeping track of work coming out of Council meetings. They noted that if they—and more directors—knew how to better use the “to-do” function with iCompass, they could save time. This equates to \$6,650 “productivity dollars” per year for one director.
3.	Mandatory director training on Keystone for budgeting	While Keystone is primarily an information management tool for a variety of municipal functions (e.g. property information, planning/building permits, resident information, etc.), it also stores general ledger and accounts payable information so it can be used by directors to manage departmental budgets. Infrastructure, Finance, and Fire and Rescue use it to support budget management, and all directors should be trained on its budget management functions to streamline budgeting and planning and promote collaborative budgeting.	Keystone: \$12,000/year Lost Productivity Dollars: \$6,650/year The Township spends \$12,000 per year on this software. One director noted that they spend 4 hours per week keeping track of disparate budgeting information and following up on Council budget approvals due a lack of collaborative budgeting. This equates to \$6,650 “productivity dollars” per year for one director. They noted that there should be one system for departmental budget that incorporates notes, identifies what types of purchases need tendering or Council approval, and ensures that items budgeted for in one location do not get paid for in another location. Using Keystone is a step towards improving this process.

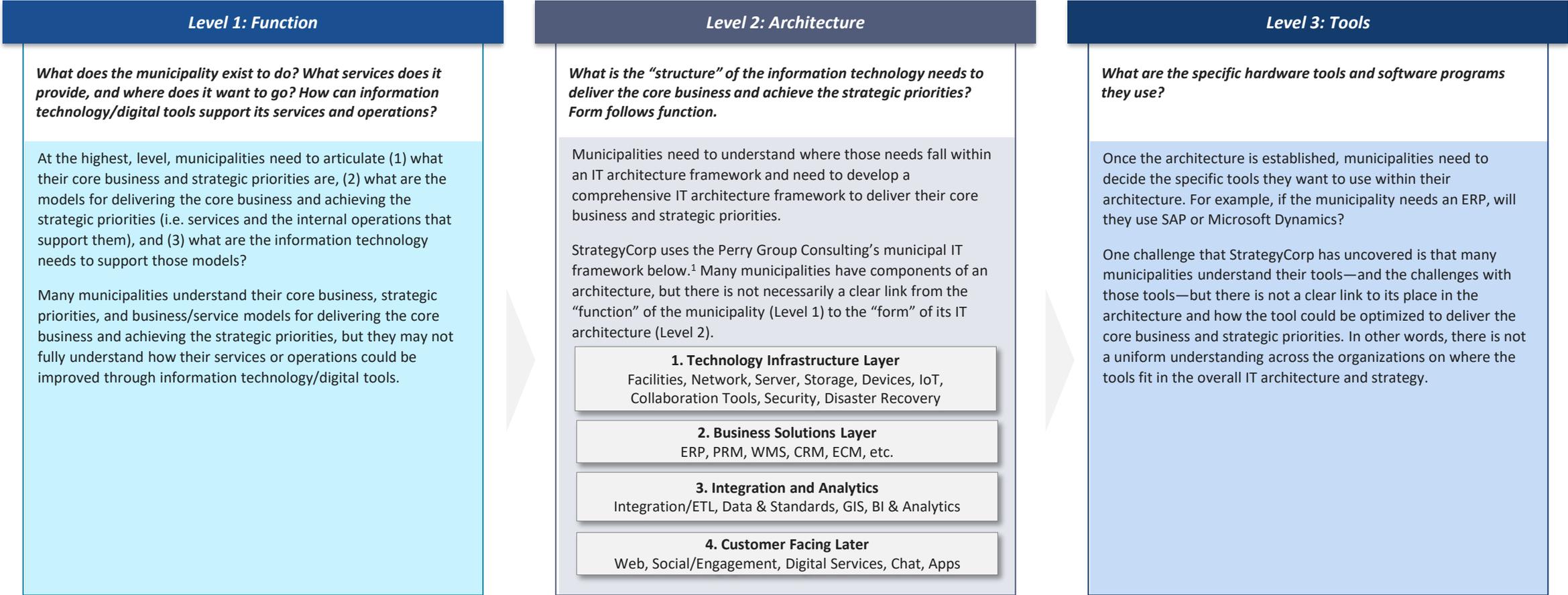
Ramara can achieve quick wins while it develops an IT/IM Master Plan

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Quick Wins		Rationale	Budget Considerations
4.	Develop a staff training schedule policy and incorporate (1) staff training, (2) use of digital tools, and (3) proper information management practices into a yearly performance management framework.	In addition to time and money considerations, staff lack an interest in using digital tools and practicing proper information management and are not held accountable. Incorporating regular training and demonstrating strong information practices as part of a performance management framework may help keep staff accountable.	Lost Productivity Dollars: \$144,710/year Based on the staff survey, staff waste, on average, 3 hours per week looking for information that is not easily accessible. This equals to approximately \$144,710 “productivity dollars” per year.
5.	Develop standardized training on ArcGIS, Keystone, and CityWide for Building, Planning, Finance, Bylaw, and Infrastructure staff.	These departments work closely together on development and infrastructure work. They should have a uniform understanding of these tools and how each department uses them.	Keystone and Citywide: \$18,600/year The Township spends \$18,600 per year on this software combined. It should ensure that it is getting the most of these information management tools. For example, the Fire and Rescue administrative assistant noted that they spend 30 minutes per week manually updating their asset management tracker. This is approximately \$830 in productivity dollars per year.
6.	Replace MaxGalaxy with a new recreation program.	MaxGalaxy is discontinuing next year, and the recreation department will need a new software program for recreation registration and program management. The recreation department would like to purchase PerfectMind as its replacement.	MaxGalaxy: \$4,400/year Replacement: TBD MaxGalaxy currently costs the Township \$4,400 per year. The department will need to assess if it is willing to invest more for a better, replacement software.
7.	Invest in staff training for CriSys software	Fire and Rescue Department staff have never received full training on the CriSys software. They currently use it to pull call data reports, but it has additional functions like personnel, training, and equipment management that could replace the department’s Excel spreadsheets. Furthermore, it may have capabilities for in-field reporting with tablets, which should be explored. It should be noted that Ramara uses CriSys because it is the software that Orillia dispatch uses. Ramara should confirm whether or not Orillia plans to migrate to another software before investing in CriSys training.	CriSys: \$1,800/year Lost Productivity Dollars: \$4,160/year The department currently uses paper processes and multiple Excel spreadsheets to manage incident call reporting, training, equipment, and personnel. These Excel and paper-based processes cost the Township about \$4,160/year in lost productivity. It is worth exploring how Ramara can best optimize this software now, especially if migration to FireHouse does not take place for a few years.

The IT/IM plan must reflect the needs and function of the Township

StrategyCorp recommends the following framework for developing a municipal IT/IM master plan.

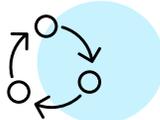


Ramara’s information technology and information management practices to date have not been framed within an understood framework that links technology and information management to functions across the Township and within departments. The first step in developing Ramara’s master IT/IM plan is to clearly articulate what the IT/IM goals are for the Township and then assess how digital tools help achieve those goals.

1. <https://www.perrygroupconsulting.ca/newsletter-archive/2020/1/19/four-levels-of-municipal-technology-architecture>

Immediate steps in the absence of an IT/IM Master Plan

In the absence of an IT/IM Master Plan in the short-term, Ramara can align the IT/IM recommendations uncovered through this review to its own strategic plan. As it develops the implementation plan for these strategic goals, the following IT/IM activities should be considered.

Strategic Goal	Supporting Activities
 <p>A workforce that is skilled and motivated</p>	<ul style="list-style-type: none"> • Establish a Technology Committee with representatives from across the departments to share needs and ideas and drive digital transformation • Better use of tablets for infrastructure field work and field inspections for fire services • Explore a team collaboration tool to replace Zoom, Slack, Evernote, and T: Drive, such as Microsoft Teams
 <p>A community that is involved and engaged</p>	<ul style="list-style-type: none"> • Invest in digital tax and utility bill look up for residents • Explore the use of website add-ons or Everbridge for additional Township communications (such as snow plow tracking) within a communications master plan • Invest in a new resident service and bylaw complaint portal that is linked to a work order tracking system • Invest in a volunteer management system for legislative and community services • Invest in a desktop publishing software to support modernized resident communications for Executive Services and Legislative and Community Services
 <p>Operations and services that are defined, prioritized, and sustained</p>	<ul style="list-style-type: none"> • Replace Sentry File and T: Drive with a new EDRMS • Invest in an updated bylaw portal • Invest in a work order tracking system that is linked to a resident service portal and bylaw complaints • Invest in digital invoicing capabilities, digital vendor payment capabilities, and online payments for permits
 <p>Growth is promoted, planned, and fostered</p>	<ul style="list-style-type: none"> • Invest in online permitting for building permits, planning permits, infrastructure department permits and invest in needed scanners for digitizing hard copies of permits, surveys, maps, etc. • Invest in ArcGIS capabilities for Township Official Plan/zoning bylaw layering • Invest in Citywide module for ArcGIS • Invest in digital tools for road maintenance planning

A workforce that is skilled and motivated



Supporting Activity	Rationale	Current IT Expenses	Budget Impact
Establish a Technology Committee with representatives from across the departments who will report into a clear IT lead	Ramara does not have a dedicated IT resource, and the County as a service provider does not currently support vision-setting for digital transformation. In the absence of these, establishing a cross-departmental committee (with a designated IT lead in the Township) tasked with digital improvements can be a forum for shared needs and ideas and driving digital transformation. Staff noted that a primary challenge with IT is not knowing what is currently being used and the departmental needs. Staff may be more motivated to bring forward new ideas if they feel that there is a coordinated approach.	N/A	While striking a committee will be an investment in time and, therefore, productivity, StrategyCorp's staff survey found that the Township could save approximately \$256,000 in "productivity dollars" if all of the IT improvements identified were implemented.
Better use of tablets for infrastructure field work and field inspections for fire services	The Infrastructure Department already uses some tablets in the field, but they do not have long battery life, so paper-based work is needed. The Township should invest in external batteries so that these tools can be better optimized. Additionally, Fire and Rescue relies heavily on paper-based processes. Digitizing field reports will help the departments better track data and boost staff morale, who feel that they waste significant time on paper processes that have easily implementable digital solutions.	Tablet expenses: N/A	The Fire and Rescue Department administrative assistant noted that if this department had field tablets to digital report work, it could save two hours per week, or approximately \$3,300 in productivity dollars per year. This would require additional investments in tablets and extra external batteries.
Explore a team collaboration tool to replace Zoom, Slack, Evernote, and T: Drive, such as Microsoft Teams	Some departments within the Township use various tools to collaborate, send instant messages instead of emails, share documents with one another, and manage projects; however, not all staff are aware these tools exist within the Township. Some software like Microsoft Teams performs all of these functions. It is important to note, though, that Teams may have some limitations for public Council meetings.	Zoom: \$3,500 Slack: \$0.00 Evernote: \$600	A subscription to a new software like Teams may be seen as a large investment. The Township is currently in the process of migrating to Microsoft 365, so all staff will learn Microsoft Office tools, potentially making integration and use easier than a completely new system. The CAO noted that 20% of his time is lost due to an inability to collaborate efficiently with team members. Using median hourly salary, this is approximately \$12,500 in "productivity dollars."

A community that is involved and engaged (1/2)



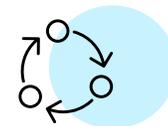
Supporting Activity	Rationale	Current IT Expenses	Budget Impact
Invest in digital tax and utility bill look up for residents	Staff spend significant time responding to resident calls on tax and utility bill look ups. A portal through the website could save staff time, improve resident service, and encourage residents to use the website more frequently.	\$0.00	Staff in the finance department collectively spend 20 hours per week supporting residents with these requests. This equates to approximately \$33,300 in productivity dollars.
Explore the use of website add-ons or Everbridge for additional Township communications (such as snow-plow tracking) within a communications master plan	<p>The Township currently uses Everbridge for resident communications, which has an opt-in feature for a variety of notifications, but with the launch of its new website, there may be opportunities to use the website for these communications and divest of Everbridge or use a cheaper subscription.</p> <p>One example of a potential website module to explore is snow-plow tracking, which the Infrastructure administrative assistant noted is a large request in the winter.</p>	eSolutions Group Website: \$9,500 Everbridge: \$7,600	If the website can completely replace Everbridge, the Township could save \$7,600 annually on this software. However, these additional web features may require a yearly subscription.
Invest in a new resident service and bylaw complaint portal that is linked to a work order tracking system (also referenced on Slide 20)	Ramara currently uses a free OS Ticket system to manage resident inquiries and work orders. This system is not user friendly and needs to be replaced. Ramara should invest in a new resident service system that can also integrate bylaw complaints and internal work orders so that staff have one intake system.	\$0.00	Four staff noted in the survey that they collectively waste 18.5 hours/week on the current work order tracking system and bylaw complaint management issues. This equates to approximately \$30,800 in “productivity dollars.” Two staff notes that they waste 7 hours per week sorting resident service complaints. This equates to approximately \$11,640 in “productivity dollars.”

A community that is involved and engaged (2/2)



Supporting Activity	Rationale	Current IT Expenses	Budget Impact
Invest in a volunteer management system for legislative and community services	Legislative and Community services requested a volunteer management system. This system could be used to manage election volunteers, recreation volunteers, etc., and the library may also benefit from a volunteer management system given that it has 40 volunteers. Having a system can improve volunteer engagement and create more ways for residents to engage with their community.	\$0.00	This type of system will require an investment in a yearly subscription.
Invest in a desktop publishing software to support modernized resident communications for Executive Services and Legislative and Community Services	Both Executive Services and Legislative and Community Services develop media and communications for residents. Executive Services uses a free LucidPress subscription, but if the Township wants to prioritize improved communications with residents, it may want to invest in a tool with more features.	LucidPress: \$0.00	This will add yearly subscription costs.

Operations and services that are defined, prioritized, and sustained



Supporting Activity	Rationale	Current IT Expenses	Budget Impact
Replace Sentry File and T: Drive with a new EDRMS	Information management is one of the Township's largest challenges and highest priorities. While staff can typically find information within their departments, searching for information in other departments wastes significant time. As part of its IT/IM transformation, Ramara needs to prioritize investing in a new electronic document and records management system in order to make operations more efficient.	SentryFile: \$0.00	Productivity Savings: \$144,710 Based on the staff survey, staff lose, on average, 3 hours per week looking for information that is not easily accessible. Using the assumptions on Slide 60, this equals approximately \$144,710 "productivity dollars" per year.
Invest in an updated bylaw portal for the website	Ramara does not currently have an online bylaw portal, so residents are not able to easily access Township bylaws. Severn and Gravenhurst use CivicWeb, Tiny uses DocuShare, and Brock has its bylaw portal embedded on its website. Introducing an online bylaw portal would not only save staff time, but also help residents better understand the bylaws in the Township.	\$0.00	This feature will require the Township to invest in a yearly subscription. Given that every department needs to access bylaws easily, the Township should prioritize this investment.
Invest in a new work order tracking system that includes bylaw enforcement complaints and resident complaints (also referenced on Slide 18)	Ramara's OS Ticket system is a free online software that is not user-friendly. As a result, Infrastructure staff use paperwork orders that are then later inputted into a tracking system by the administrative assistant. The system is also inaccessible in the field, so bylaw enforcement officers have to manually input details into the system later. A strong and well used work order management system ensures that work is organized and correctly prioritized.	\$0.00	Four staff noted in the survey that they collectively lose 18.5 hours/week on the current work order tracking system and bylaw complaint management issues. This equates to approximately \$30,800 in "productivity dollars." Two staff noted that they waste 7 hours per week sorting resident service complaints. This equates to approximately \$11,640 in "productivity dollars" per year
Invest in digital invoicing capabilities, digital vendor payment capabilities, and online payments for permits	The Building, Planning, and Finance Departments all noted the need for digital invoicing and online payments for vendors and for permits (building, planning, infrastructure, etc.) Streamlining this function digitally would allow staff to spend more time on more important operations and services.	\$0.00	Six staff noted in the survey they collectively lose 25.5 hours/week due to a lack of ability to invoice digital and process online payments. This equates to approximately \$42,400 in "productivity dollars."

Growth is promoted, planned, and fostered



Supporting Activity	Rationale	Current IT Expenses	Budget Impact
Invest in online permitting for building permits, planning permits, infrastructure department permits and invest in needed scanners for digitizing hard copies of permits, surveys, maps, etc.	Ramara's development services are all paper-based. Working on paper systems is not only time consuming for staff, but also time consuming for residents and developers who must submit plans in hard copies. In order to promote more development in the Township, these functions must be digitized.	\$0.00	Six staff noted in the survey that they collectively lose 36.88 hours/week due to paper-based permitting processes. This equates to approximately \$61,340 in "productivity dollars."
Invest in ArcGIS capabilities for Township Official Plan/zoning bylaw layering	Ramara's Planning and Building Departments noted that while ArcGIS is helpful, having Township Official Plan and zoning bylaw layering would streamline their work significantly. They currently have to use paper copies of the Official Plan and zoning bylaws when providing planning and building services. Having these layers could streamline building and planning and better support development in the Township.	ArcGIS: \$0.00 (County-owned)	Six staff noted in the survey that they collectively lose 21.25 hours/week due to paper-based permitting processes. This equates to approximately \$35,345 in "productivity dollars." Ramara would need to invest in this layering.
Invest in CityWide module for ArcGIS	Ramara is currently exploring connecting CityWide with ArcGIS. Infrastructure staff noted that this module would significantly streamline and improve asset management. Strong asset management allows costs to be smoothed over time.	CityWide: \$6,600	Ramara would need to invest in this module, but it would allow the Township to get more value out of CityWide.
Invest in digital tools for road maintenance planning	The Infrastructure Department lacks a road maintenance planning tool and uses a mix of paper and spreadsheets to track finances, employee time, project management. Road maintenance is a function that is critical to further growing and developing Ramara, and the department needs a proper planning tool.	\$0.00	One staff member noted in the survey that they lose 8 hours/week due to a lack of digital road maintenance planning tools. This equates to approximately \$13,300 in "productivity dollars." Ramara would need to invest in this digital tool.

Proposed sequencing for IT/IM decision-making (1/2)

Ramara will need to make decisions on a few critical items before it can purchase some of the proposed IT tools:

Decision	Subsequent Decisions	Sequencing Rationale
Formalize the proposed strategic plan	Develop a more robust IT/IM Master Plan aligned to the strategic plan.	Any IT/IM Master Plan or strategy needs to flow from the Township's overall strategic plan. In the absence of an IT/IM Master Plan, Ramara can set the recommendations from this report against its current strategic goals.
Develop a communications master plan for website, internal communications, social media	Choosing Everbridge or the website for resident communications notifications.	The communications master plan should set out the Township's goals for how it will use the website and should explain the protocol for sending communications to residents. Once this framework is set, it can help staff decide which tool is best to support mass resident communications.
	Determining which desktop publishing software you purchase for Executive Services and Legislative and Community Services.	The communications master plan should set out the chain of command for communications and how departments will be involved in communications development. Some municipalities provide departments a communications "tool kit" with templated documents, standard colours/themes, etc. to use for communications. Other municipalities have a communications department that is highly involved in communications across the Township. Once Ramara decides its communications master plan and policies, it can then decide which software is best (and how many licenses to purchase) depending on who is involved in communications development.

Proposed sequencing for IT/IM decision-making (2/2)

Ramara will need to make decisions on a few critical items before it can purchase some of the proposed IT tools:

Decision	Subsequent Decisions	Sequencing Rationale
Decide which electronic document and records management system is best for the Township	Multiple departments want updates to their records management systems not only for cross-departmental work, but also for work within their own departments. For example, Fire and Rescue primarily uses paper and Excel to manage records. Before this can be updated, the Township should decide which Township-wide EDRMS it will invest in to replace Sentry File and the T: Drive.	The Township needs to make a corporate decision on which EDRMS system it will use before the departments can improve their own internal processes. The system change needs to come from the top to ensure interoperability among departments.
	Standardizing training on information management.	Information management policies and protocols will be dependent on the EDRMS system Ramara chooses. It should wait to develop policies until the new system is in place.
	Choosing an online bylaw portal.	The EDRMS should be interoperable with the public-facing online bylaw portal to ensure that as staff update it internally, it updates to the public-facing portal.
Decide if the Township wants a work order system that is also linked to resident complaints and bylaw complaints.	Choosing a new work order system, resident service/complaint management system, and bylaw complaint system.	Ramara may determine that the staff who perform work primarily for the Township (i.e. some infrastructure maintenance staff) do not need to be linked to a system for resident and bylaw complaints. On the other hand, the Township may determine that having one intake system for internal work orders, resident complaints, and bylaw complaints may find efficiencies. This decision should be made before any of these systems is explored.
Decide if the Township is purchasing a full suite of Microsoft 365 tools once the Office Exchange license expires.	Choosing a team collaboration software.	The Township is currently using Microsoft Office Exchange but is considering Office 365 once the license expires. Microsoft Teams is a collaboration tool that could replace Evernote, Slack, Zoom, and the T: Drive (document sharing). If the Township chooses to fully transition to Office 365, Teams may be a worthwhile investment because it will be interoperable with other Office 365 functions.



Fire & Rescue Services Review

Initiative Overview

Description

The Ramara Fire and Rescue Department (RFRD) provides a variety of legislated and discretionary fire and rescue services. It is well-respected in the local community and region due to its highly-specialized and well-trained volunteer force. Through the current state assessment phase, StrategyCorp uncovered that the department did not have a recent assessment of its service levels and, therefore, could not assess whether or not its costs—primarily fleet—reflected the service needs of the community. StrategyCorp found that the department has several mutual and automatic aid agreements but did not have an assessment on whether or not the actual service provision reflected fair reciprocity. As part of the initiatives phase of the service delivery review, StrategyCorp assessed services and found that Ramara was under-serving the community in two services, was meeting community need in four services, and was over-servicing in one service. StrategyCorp was unable to assess remote access services due to lack of data. Additionally, StrategyCorp assessed that Ramara’s mutual and automatic aid responses make up a small proportion of its calls, but true reciprocity cannot be analyzed due to data limitations.

Through this deep dive, StrategyCorp proposes the following four recommendations.

Recommendations

- 1 Continue to provide ice and water rescue services
- 2 Reduce HazMat response and do not replace technical gear
- 3 Introduce burn permits
- 4 Hire a Fire Prevention Officer

Financial Impact

Financial Summary	
5-Year Costs	
Continue to provide ice and water rescue services*	\$425,000.00
Hire a Fire Prevention Officer	\$400,000.00
Total 5-Year Costs	\$825,000.00
5-Year Savings	
Discontinue HazMat technical gear	\$21,000.00
5-Year Revenue	
Introduce burn permits (~\$75k/year)	\$375,000.00
Total 5-Year Savings/Revenue	\$396,000.00

*The main expenses for ice and water rescue are the capital expenses. Ramara will need to spend \$425,000 by 2025 to replace its four assets for this service. StrategyCorp has provided options for offsetting these costs in the following slides.



Service Level Analysis

Fire Prevention & Education

Description:

This service includes developing and/or delivering the Township’s fire education programs (e.g. school programs, Alarmed for Life, and other community engagement), fire safety and WETT inspections, fire investigations, and fire safety plans.

Service Level Standards:

Legislated – *Fire Protection and Prevention Act, 1997 (FPPA)* sets out minimum requirements for public education programs, inspections, smoke alarm programs, and a simplified risk assessment.

Service Considerations:

Population Distribution – Given Ramara’s large rural community, prevention and education efforts are critical to saving lives and property where emergency response times tend to be longer.

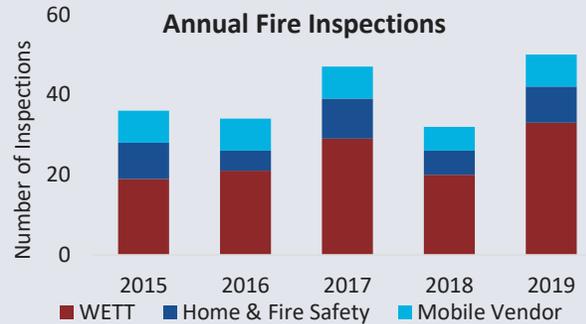
Short-term Rentals – The new bylaw has and will continue to put increasing service pressures on fire inspections.

Cost Centers:

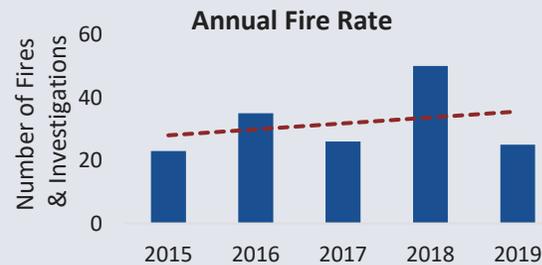
Salaries - Main driver of costs for education and prevention are salary of employees providing services.

Service Volume:

Inspections - Ramara has seen a modest increase in the number of fire inspections it completes, but this number has and is expected to grow substantially given the Township’s new short-term rental bylaw fire inspection requirements.



Investigations – Volumes are directly determined by the number of fires that occur, which is influenced by several factors including effectiveness of prevention and education efforts.



Service Level Assessment

Under Servicing

Meeting Needs

Over Servicing

Given current staffing levels and the increasing pressure of fire inspections for short-term rentals, Ramara’s fire prevention and education service it at risk of falling into under servicing its residents.

Fire Suppression

Description:

This service includes responding to all fire-related emergencies and providing rescue, control, and suppression as necessary based on each circumstance.

Service Level Standards:

Legislated - The *Fire Protection and Prevention Act, 1997* sets out that Municipalities should provide fire suppression services that meet the specific needs of the community as described in the municipality’s *Community Risk Assessment*.

Service Considerations:

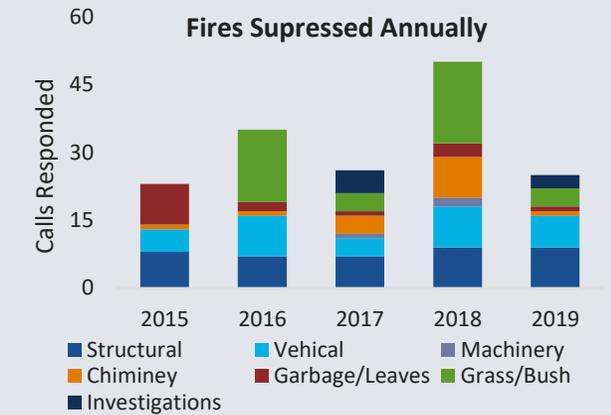
Community Risk Assessment – This assessment is based on several factors, including housing stock and land use. Best practice has established guidelines to determine suppression service needs based on that assessment.

Cost Centers:

Towers, Pumpers, and Tankers – The main cost drivers for fire suppression are the purchase and maintenance of specialized equipment, which must meet legislated standard, as well as those set out by insurance underwriters to provide cost savings to residents.

Service Volume:

Fire suppression volumes are driven by fires, which can be influenced by a wide variety of factors, including effective fire prevention activities. Over the last 5 years, the largest determiner of total call volumes has been grass and brush fires.



Service Level Assessment

Under Servicing

Meeting Needs

Over Servicing

FRRD’s fire suppression service levels are based on the community’s unique risk assessment and insurance standards.

Ice & Water Rescue

Description:

Response to emergencies requiring advance rescue services on/in the ice or water.

Service Level Standards:

Discretionary – Service level to be determined by Council based on community needs. The Town currently delivers *Advanced Marine, Ice, and Water Rescue Capabilities*.

Service Considerations:

Geographic – The township contains ~250km of waterfront on Lake Simcoe, Lake Couchiching, and various smaller lakes and waterways, as well as eight islands.

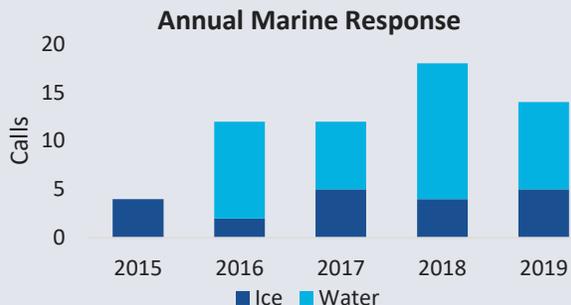
Service Gap – Northern L. Simcoe and L. Couchiching are poorly serviced for marine rescue compared to the southern portion of the lake. The nearest OPP marine unit is based in Gravenhurst. OPP response time is significantly slower than RFD and aimed at *recovery* as opposed to *rescue*. Additionally, Ramara now houses 1 of only 2 airboats stationed near L. Simcoe, the other is with South Simcoe PD.

Community Driven – Air boat and marine units were donated by community groups. This was due to the identified need by the community.

Aging Infrastructure – All the department’s ice and water rescue fleet is over 10 years old, with the Airboat and Stanley both over 30 years old.

Service Volume:

Ice and water rescue calls are trending upward slightly, but like most emergency calls, they are dependent on any number of external factors including the weather.



If development of Ramara’s Islands continues, the need for marine units and rescue will only continue to rise.

Cost Centers:

Replacement Costs – The main cost drivers for this service are replacement costs for aging apparatus. The departments 10-year forecast (2018) includes replacing both zodiacs (\$65,000; \$35,000), the Stanley (\$125,000) and the Airboat (\$200,000) by 2025.

Service Level Assessment

<i>Under Servicing</i>	The Township’s current service meets the needs and expectations of the community, providing a more reliable and rapid response than the OPP. However, the department’s ice and water rescue apparatus are nearing their end of life and, if not replaced, will dramatically reduce or eliminate the Township’s ice and water rescue capabilities.
<i>Meeting Needs</i>	
<i>Over Servicing</i>	

Remote Access

Description:

The provision of fire and search and rescue services in areas without road or water access.

Service Level Standards:

Discretionary – Service level to be determined by Council based on community needs.

Service Considerations:

Geography – Ramara contains large areas of forest and undeveloped land that lacks road or water access to bring in fire suppression equipment and volunteers.

Coverage – Providing this service gives the department a wider range of coverage for providing the other standard and specialized services it offers.

Service Volume:

There is no specific data available on how often other services require remote access.

Cost Centers:

Capital Equipment – The department houses two ATVs that account for the majority of cost for this service, as the service does not require much specialized training.

Service Level Assessment

<i>Under Servicing</i>	Not enough data exists to make a conclusive determination on if providing remote access is meeting a specific community need. This service should be evaluated based on the capital costs and uses of the ATVs as the operational costs are marginal.
<i>Meeting Needs</i>	
<i>Over Servicing</i>	

Motor Accident Assist & Vehicle Extraction

Description:

Responding to motor accidents requiring rescue support from within the vehicle and providing support to OPP.

Service Level Standards:

Discretionary – Service level to be determined by Council based on community needs.

Service Considerations:

Road Corridors – Ramara has several major road corridors that primarily carry through traffic.

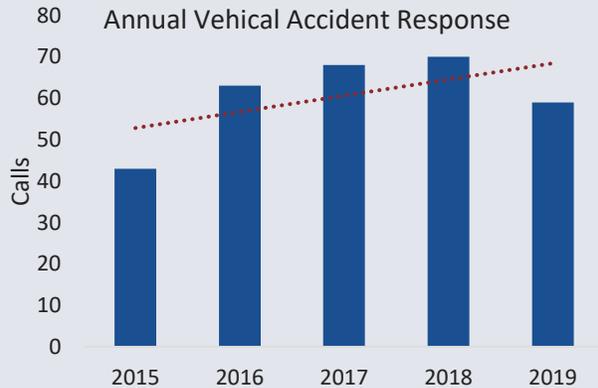
Cost Recovery – in most cases, RFRD is able to charge at fault motorist or OPP for these calls as generally RFRD is not the primary responder.

Cost Centers:

Calls – The department received relatively frequent calls for motor accident response. Call out cost are likely the largest annual cost driver.

Service Volume:

Calls out to assist with motor accidents have been increasing over the last 5 years. This is likely due to increased motor traffic on HWY 12 and other major corridors through the Township and will likely continue to increase as development moves north to Barrie.



Service Level Assessment

Under Servicing

Meeting Needs

Over Servicing

Ramara’s vehicle extraction and motor accident response is mostly cost recoverable and is meeting the need of residents and road users in the area.

Hazardous Material Response

Description:

Response to gas/chemical spills as well as CO detector alarms.

Service Level Standards:

Discretionary - Service level to be determined by Council based on community needs. The Town currently delivers *Technical Level* hazmat response.

Service Considerations:

Stepan Agreement – RFRD HazMat service level was previously established in an agreement with Stepan, a chemical plant formerly located in the Township that funded the departments Tech Level response preparedness.

Simcoe/Barrie MOU – RFSR is currently in an agreement with Simcoe County and Barrie to maintain a standard, operational level HazMat response, below Ramara’s current level.

Transportation Corridors – Ramara contains several transportation corridors including road and rail that carry dangerous substances.

Service Level Assessment

Under Servicing

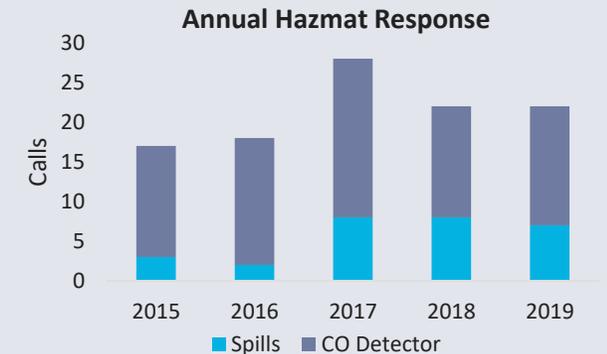
Meeting Needs

Over Servicing

RFRD is currently over servicing the community with its HazMat response capabilities. Given the expiration of the Stepan agreement and the MOU with the County and Barrie, an operational level response would be sufficient.

Service Volume:

While the department does occasionally respond to natural gas or fuel spills, the majority of HazMat response calls are related to CO detector alarms or incidents in which CO is perceived or present.



The department has not had any calls in the last 5 years requiring a tech level hazmat response.

Cost Centers:

Replacement Costs – While the department’s HazMat response gear and training was funded externally, the agreement has expired, and replacement costs of tech level equipment could run between \$19,000-22,000 over the next 5 years

Medical Response

Description:

The fire department responds to calls for medical emergencies to provide medical aid until transportation can arrive, including the use of defibrillation.

Service Level Standards:

County Service – The County is legislated to provide emergency medical response and transport to the municipality. RFRD currently has a modified, tiered response for medical assist calls with a Rapid Response Unit on call during day-time hours.

Service Considerations:

Poor Ambulance Coverage – The majority of Ramara’s ambulance responses comes from Simcoe’s mutual aid partners, due to its isolated location relative to the rest of the County, and those partners can be far from emergencies in Ramara. The average response time for an ambulance in Ramara is around 24 minutes.

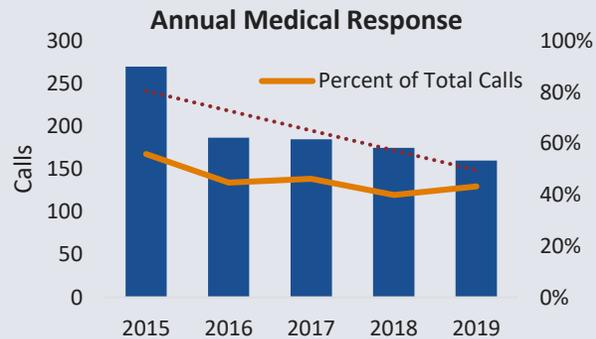
Large proportion of medical calls – Medical assistance calls make up the largest portion of 911 calls for RFRD, and the cost of these calls cannot be recovered.

Cost Centers:

The main cost driver is the number of calls that RFRD responds to.

Service Volume:

Medical calls make up the majority of fire department call outs across Ontario, and this is also the case in Ramara. The apparent decline in calls is the result of a 2016 decision by Council to change the tiered response of RFRD to respond to lower level calls and install a Rapid Response Unit during the day for level A calls. This did reduce the number of calls, but they still make up the majority of RFRD calls and will likely continue to increase given the Township’s demographics and poor ambulance coverage.



Service Level Assessment

Under Servicing

Meeting Needs

Over Servicing

Medical Response in Ramara does not currently meet the needs of residents with respect to ambulatory coverage, but because it is a County service, there is little at this time the Township can do to improve coverage without incurring its own ambulance costs.

911 Dispatch

Description:

Ramara receives incoming 9-1-1 calls and initiates the appropriate police, ambulance, and fire response in the appropriate area. Ramara contracts out 911 dispatch services to Orillia.

Service Level Standards:

Legislated – Guidance from the Fire Marshal direct municipalities on how call data must be used for compliance with *FPPA, 1997*

Service Considerations:

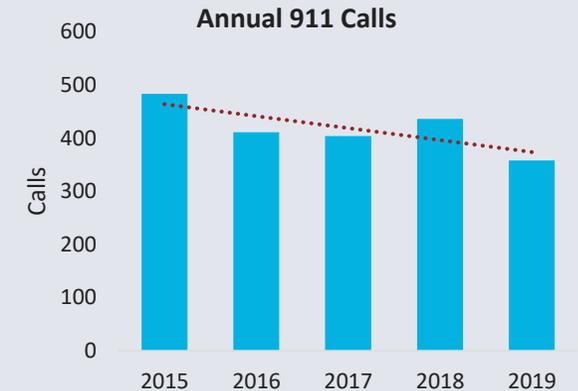
Regional Mutual Aid Agreements – Many of the municipalities in surrounding Ramara and the Lake Simcoe area share mutual and automatic aid agreements and contract the same dispatch services. This continuity allows for organized and efficient deployment of appropriate emergency response across the region.

Cost Centers:

The only cost associated with this service is the service contract which equals \$27,000 annually.

Service Volume:

The volume of calls is determined by the number of emergencies called in by residents; however, the Township can influence the number of calls they receive from dispatch by altering the types of calls they respond to. This was seen in 2016 when Council reduced the level of response to medical assist calls.



Service Level Assessment

Under Servicing

Meeting Needs

Over Servicing

The department has found that its current dispatch system is meeting the needs of the community. Given that most agencies in the region use the same dispatch and share several mutual and automatic aid agreements, coordination of deployment is optimized.

Mutual Aid: Regional Service Delivery Partners & Partnerships

The Ramara Fire Department has strong formal and informal relationships across the region. Given its geographical location with respect to municipal boundaries, as well as topographical ones, the department has been very successful in securing mutual or automatic aid agreements for fire protection services with all of its neighbours. The Township has formalized agreements with the following regional government and organizations:

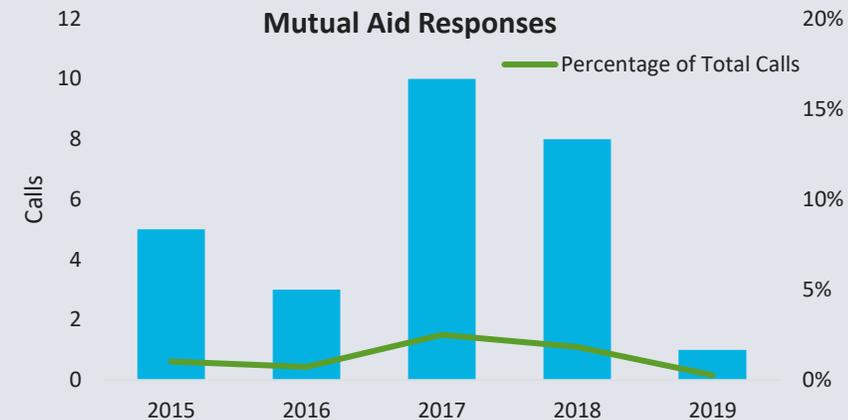
- ✓ Brock
- ✓ Kawartha Lakes
- ✓ Orillia
- ✓ Severin
- ✓ Simcoe County
- ✓ Ministry of Natural Resources
- ✓ Ontario Provincial Police
- ✓ Barrie
- ✓ Gravenhurst
- ✓ Rama First Nation

The department also has a robust list of other service agreements with regional partners to coordinate, provide, and receive many specialized services.

- ✓ 911 Dispatch
- ✓ Emergency Social Services
- ✓ Provincial & County Forest Fire Response
- ✓ Hazmat Response
- ✓ Marine Incident Protocols
- ✓ Defibrillator Access
- ✓ Technical Rescue
- ✓ Supplementary Firefighting Equipment

Partnership Impacts

- ✓ Optimized fire protection coverage for all residents in the Township through mutual and automatic agreements.
- ✓ Optimized dispatch given number of shared services in the region.
- ✓ Mutual Aid Agreements are good for volunteer morale, providing more opportunities to support the region and represent the department in other communities.
- ✓ Strong regional presence and relationships with key regional funders and service users.
- X In some cases, automatic aid agreements can lead to lower volunteer turn out when there is an assured response from other forces.
- X Reduces the ability to charge outside municipalities for certain services.



Observations

- Ramara’s service agreements generally provide service improvements to the community overall.
- Calls from other municipalities for mutual aid do not make up a significant portion of the department’s deployments.
- The equity of Ramara’s mutual aid agreements cannot be determined at this time because municipal departments each only track their own calls and deployments, not the number, size, or responsiveness of other municipalities to Ramara. RFRD should look to track other municipal responses for data analysis purposes to determine if its mutual aid agreements are equitable.
- Where it is legal and justified, Ramara aims for cost recovery for specialized services and responses to other agencies including the OPP, MNR, etc. and should continue to do so.
- Ramara should continue to monitor the effect of its partnerships and agreements on the morale and turn-out rates of its volunteers.



Recommendations

1: Continue Ice and Water Rescue Services (1/2)

Initiative Description

The Township is quickly approaching the need to determine the future of its marine capabilities and ice and water rescue services. The provision of these services to the community by RFRD is dependent on the equipment and apparatus it maintains, and all three of the department's marine units, as well as its airboat, are scheduled for replacement by 2025. To maintain its current level of service, Council will need to find capital funding for these resources or discontinue these services for residents.

Service Gap in the Region

While the southern end of Lake Simcoe is well patrolled and serviced by various police services, the northern end, Lake Couchiching, and the various waterways in the region are primarily serviced by RFRD and the Orillia-based OPP. Should RFRD lose its marine and ice rescue capabilities, the community would be reliant on the OPP—whose closest marine unit is often housed in Gravenhurst but can be deployed in a much larger region—and Mnjikaning FD.

Impact

- Department leadership also highlighted that the specialization opportunity offered by RFRD is a large part of the attraction for recruitment of volunteers, indicating that there would be volunteer drop-outs if the service was cut.
- RFRD has been responsible for the expansion of the Guardians Program, which contributes to a large, certified, community-based response system for marine emergencies, which would be lost by the elimination of this service.
- The loss of this service and its apparatus would also lead to deficiencies in other service areas offered by the department due to the geography of the Township. Marine units are often used to aid in fire suppression activities in Lagoon City and on the islands. Without these units, RFRD would no longer be able to offer fire suppression service to Ramara's island-dwelling communities.

Unit	Model	Age	Cost of Replacement	Planned Replacement
Marine 2				
	16-foot Zodiac	21 yr (1999)	\$65,000	2019
Airboat				
	18-foot Huskey	34 yr (1986)	\$200,000	2023
Marine 3				
	12-foot Zodiac	11 yr (2009)	\$35,000	2024
Marine 1				
	26-foot Stanley	30 yr (1990)	\$125,000	2025

1: Continue Ice and Water Rescue Services (2/2)

Financing Options

I

Explore regional agreements for the northern end of Lake Simcoe

- Ramara is not the only under-serviced community for ice and water rescue. Other communities on the northeastern side of Lake Simcoe may have interest in establishing more formalized funding agreements (i.e. automatic aid) to ensure continuing service in the region. Brock Township and the Township of Severn have both paid for Ramara’s specialized services in the past and may be willing to invest to protect the service from disappearing entirely.

II

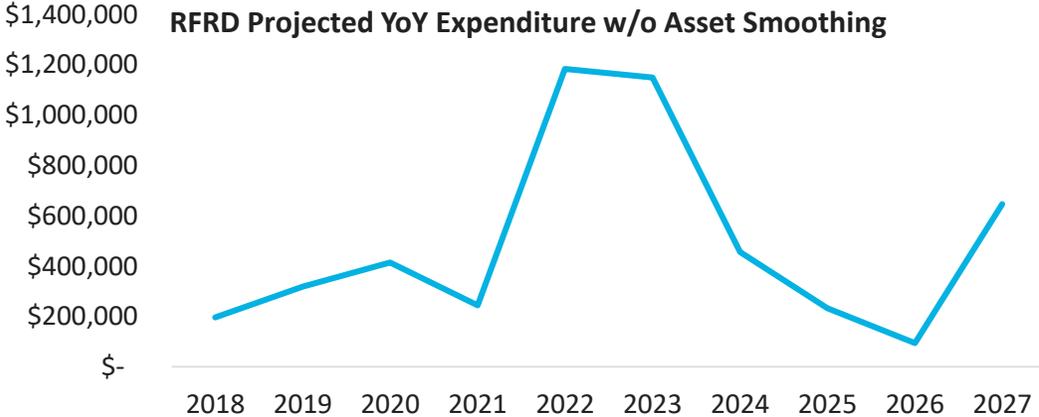
Solicit Community Support

- Ramara’s ice and water rescue services were born from community demand and subsequent donations. Given the large capital investments required to maintain the service, it may be reasonable to look to the community to help raise the funds required.

III

Adjust Long-term Capital Forecast

- If Ramara plans to maintain the current service level, it needs to (1) incorporate the marine fleet into its long-term asset management planning and (2) fund capital investments using a reserve policy that levels out the department’s year-over-year expenditure and leads to more consistent tax increases, as opposed to fluctuations that lead to tax hikes or service cuts.



2: Reduce HazMat Response Level

Initiative Description

Ramara is currently over servicing the community for hazardous material response. As a result of the Stepan Agreement and Bylaw, the company paid for all the equipment, maintenance, and training RFRD needed to provide *Technical Level* response. As Stepan is no longer operating in the community, and the need for such a response is non-existent, Ramara should reduce its HazMat response to an *Operational Level*, in compliance with its MOU with Barrie and Simcoe County.

Cost Avoidance

While the maintenance of the remaining Technical Level response equipment currently represents a negligible cost, it has reached its official end of life. The department currently houses 14 level A suits that would need to be replaced over the next 5 years if the department was to maintain current service level. The Township would not need to replace these suits to maintain an Ops level response and would avoid replacement costs of around \$1,500 per suit, approximately **\$21,000 over the next 5 years**.

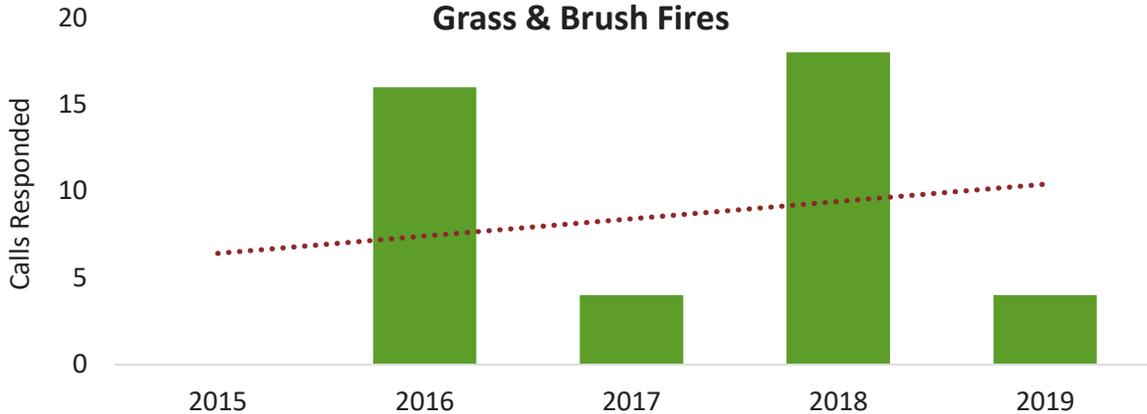
Implementation

- As the departments level A HazMat suits fail annual testing, they should be decommissioned, and not replaced.
- Over the next 2-3 years RFRD should phase out Tech Level HazMat training for its volunteers and limit training to the Ops Level.
- Given all the suits are at the end of the manufacturer's recommended use, it is expected that all the suits should be decommissioned in 5-years time. At this time decommissioning functional suits should be considered, given reduced ongoing training at the Tech Level.

Enhance Fire Education & Prevention

Initiative Description

Ramara needs to re-evaluate how it will resource its Fire Prevention efforts moving forward. While the *Fire Protection and Prevention Act* sets out minimum standards, prevention and safety should necessarily be at the fore front of every fire departments activities. RFRD and Council have previously identified the need for additional staff resources in the form of a fire prevention officer, but this appointment has been put off for several years. The appointment of a dedicated Fire Prevention Officer is common practice among peer municipalities and helps drive public education and communication efforts as well as completing fire inspections. In addition to appointing FPO's, many peers require residents to purchase burn permits as a way of maintaining a direct line of communication with residents setting fires in the community and recover costs for the department.



Forest and Brush Fires

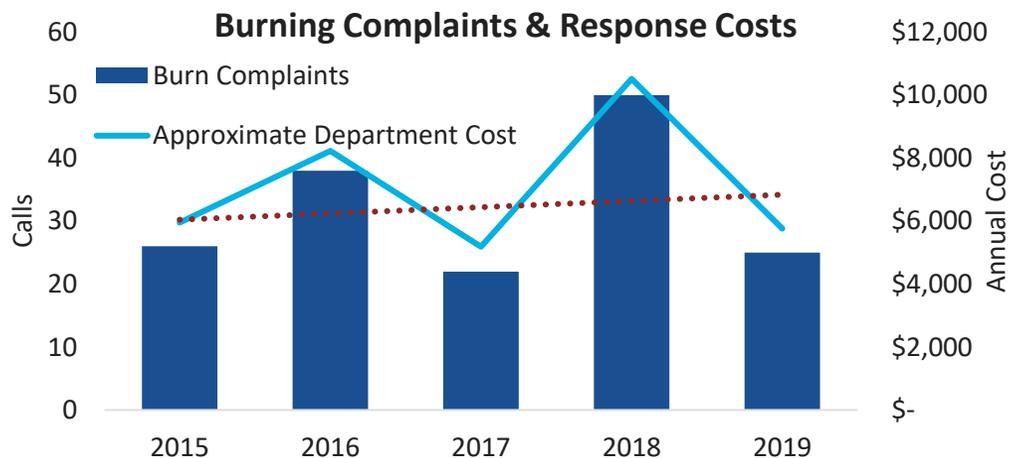
While wildfire frequency and severity is dictated by several factors including seasonal weather, severe fires like those in 2018 are likely to increase in frequency as the effects of climate change are realized. These fires are most frequently set by humans, and education and communication are the most effective way of preventing these incidences.

Municipality	Ramara	Severn	Tay	Tiny	Brock	Gravenhurst
Dedicated Fire Prevention Officer		✓		✓	✓	✓
Issue Burn Permits		✓ (for large or daytime burns)	✓	✓	✓	
Fees		\$5 by week \$20 seasonal	\$20 annually	\$25 annually	\$20 annually	
Permits issued as a percentage of dwellings	none	n/a	~40%	~50%	~20% (new 2020)	

3: Introduce Burn Permits

Burn Permits

Requiring all residents who desire to set open fires to purchase or register for an annual burn permit would allow the municipality to maintain a direct line of communication with residents to inform them about open burning requirements, safety, and updated alerts on fire hazards and burn bans. In peer municipalities, including recreational fires in these permit systems has led to more compliance with burn bans and reduced open burning complaints (Brock recently expanded permit requirements to recreational fires).



Cost of Open Burning Complaints

The department has seen a slight increase in the frequency of burn complaints it must respond to. These complaints tend to increase in the years there are more brush fires and when there are frequent burn bans. Responding to these complaints likely costs the Township **an average of \$7,000 annually** over the last 5 years depending on the number of calls and assuming 1 full response, ~80% requiring 1-2 volunteers with no intervention required, and 20% with some intervention required. If fires require intervention more frequently, this estimate will increase.

Revenue and Cost Recovery

The issuance of burn permits is a good way to recover cost for open burns and generate additional revenue. With a permit system, the Township can set both permits fees, limits, and also penalties for those contravening the bylaw. Based on peer comparators, Ramara could expect between 40-50% of its private dwellings (between 2,500-3,000) to purchase burn permits. Depending on the set price of permits, the Township could **generate \$50,000-\$75,000 annually**.

Potential Burn Permit Revenue



4: Hire a Fire Prevention Officer

Fire Prevention Officer

Council previously approved the hiring of a new Fire Prevention Officer position, but due to financial constraints, requested the department not fill the position. However, in the past year, changes have occurred that will make increasing the departments' staff capacity more urgent.

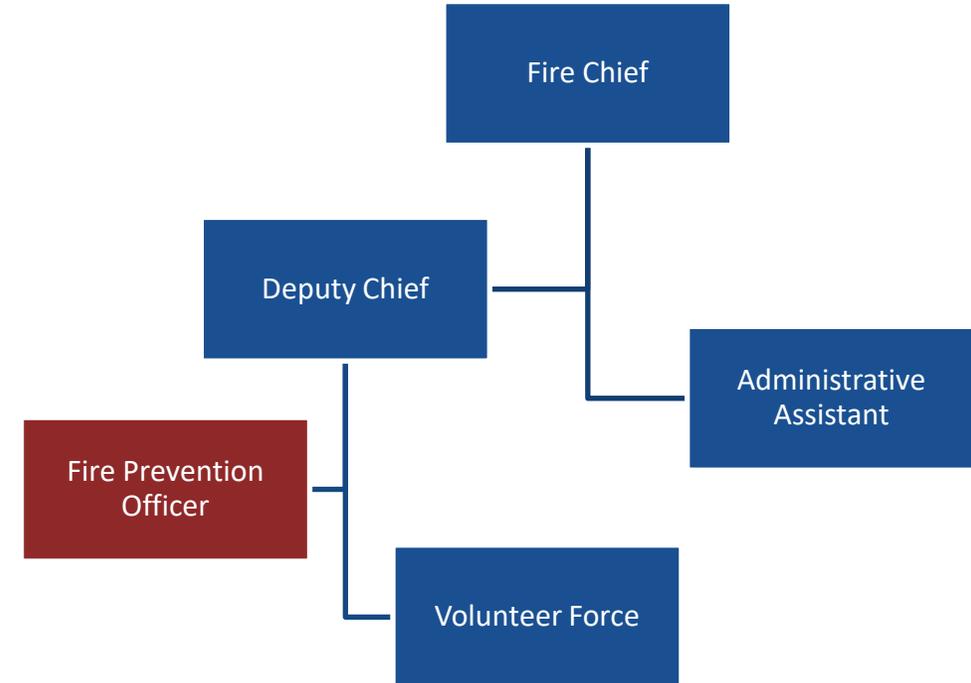
- (1) The Township recently implemented its Short-term Rental bylaw, which requires all license holders to obtain a fire inspection, increasing demand of the department.
- (2) The Township recently shifted the department's administrative assistant to be shared between the Fire and Infrastructure department, reducing the department's capacity from 3 to 2.5 FTEs.

Additional Staff Support for Inspections

In addition to administering education programs, the permit programs, and regular fire inspections, a qualified FPO with BCIN certification could potentially be used to help backfill the building department, which currently has approximately 2,500 outstanding permits dating back as far as the early 2000's. As dedicated Building inspectors are in short supply, this may be an effective stop gap to help the building department deal with its own staff capacity issues, through increased cross training efforts.

FPO Costs

According to the jobs site Neuvoo, the average annual salary for a Fire Prevention Officer in Canada is \$61,000. In Ontario, available postings indicate this is a low estimation, and given the BCIN certification or potential training, the Township could expect to pay between **\$60,000-80,000 annually** for this position.





Recreation and Library Services

Recreation and Library: Initiative Overview

Description

Through the current state assessment phase of the service delivery review, StrategyCorp heard from Ramara Council and staff that recreation and library services need a revamped vision and clearer understanding of their place among Council’s priorities. Any direction that Council takes on these services needs to be placed within a broader strategic plan for the Township. Once strategic priorities are set for the future of Ramara, then Council and staff can work together on the budgeting and planning implications for recreation and library services, identifying what the Township “will get” with investments in these services (and what cuts may be needed elsewhere to accommodate this, or what the impact is on the municipal levy) or what the Township will “lose” if reduction to these services take place.

As Council develops its strategic plan and the implications for recreation and library services, it will need to consider the following: Ramara’s demographics, budget considerations (i.e., overall savings from these two departments will be limited), how Ramara compares to its peer within these areas, and how the community values these services.

In order to help Council set a direction for these services, in the following slides, StrategyCorp has set the context for these services and has provided an overview of what Ramara’s future for recreation and library services looks like if it maintains the status quo, if it invests 5% of its budget towards recreation and library services, and if it contracts library services to Orillia and invests 2.5% of its budget towards recreation.

Considerations	Maintain Status Quo	Strategic Option 1: Invest in Recreation and Library Services	Strategic Option 2: Subsidize Orillia Library Services and Invest in Recreation
Option Overview	<ul style="list-style-type: none"> 6.4% Increase in Township Budget 1.3% Decrease in Library Grant 14.2% Increase in Recreation Expenses 	<ul style="list-style-type: none"> 6.4% Increase in Township Budget 2.5% of Budget Towards Library Grant 2.5% of Budget Towards Recreation Services 	<ul style="list-style-type: none"> 6.4% Increase in Township Budget 0.5% of Budget to Contract Orillia for Library Services 2.5% of Budget towards Recreation Services
Capital	<ul style="list-style-type: none"> Recreation and library will continue to have spacing challenges and will continue to turn residents away from programs 	<ul style="list-style-type: none"> New library with Ramara Historical Society Sell or repurpose Brechin Medical Centre Art and theatre programming space and media space in Ramara Centre 	<ul style="list-style-type: none"> Sell or repurpose Brechin Medical Centre Ramara Centre fully repurposed and renovated for recreation programming
Programming	<ul style="list-style-type: none"> Programs will be “stale and redundant” Residents will participate in programs outside the Township Ramara will lose talented staff 	<ul style="list-style-type: none"> New recreation programming, such as theatre and dance New library programming, such as new digital programs (and staff training), education support for students New digital library collections 	<ul style="list-style-type: none"> Recreation service options will increase, and recreation will take over some library services like technology support
Public policy considerations	<ul style="list-style-type: none"> Residents will continue to use and value these services, but they may be more vocal in demanding change 	<ul style="list-style-type: none"> Residents have sought improved recreation and library space and programming for years and investing in these services will likely be seen as a political win for Council 	<ul style="list-style-type: none"> Residents will likely be unhappy with this decision



StrategyCorp recommends that Council invest in recreation and library services and not use Orillia for library services.

Ramara needs an updated vision for recreation and library services

Background

Recreation and library services lack an achievable vision and clear understanding of their place among Council’s priorities. Though Council members noted that their priorities are in “hard” services, there is no clear articulation of how recreation and library services fit into Council’s vision for the Township. Specifically, the review found that some recreation and library programming was overcapacity, that recreation services and the library has some duplicative programming, and that there may be opportunities to cross-train recreation volunteers with parks and trails maintenance—or potentially reorganize the department to move parks and trails maintenance under the recreation supervisor.

The lack of vision has prevented both the recreation department and library from being able to work towards some of their own goals. For example, the Township had been planning to undertake a library expansion in 2010 and 2014. The library secured its own capital funding but requested \$17,000 from the municipality for waived fees/permits and a new septic system. It also estimated a \$7,500 increase in its yearly operating budget as a result of this expansion. Council did not support this expansion.

Additionally, the Recreation Department undertook a 2012 Recreation Master Plan and a 2019 Space Needs Study, but the findings and recommendations from these exercises were not implemented due to a lack of support from Council.

In addition to these findings from the current state phase of the service delivery review, the Administration recommended to Council —through its findings from the Board and Committee Review—that it undertake an independent review of library and recreation services.

StrategyCorp’s Approach to this Initiative

In order to provide Council a better understanding of the current state of recreation and library services and provide guidance on how to approach vision-setting for these services, StrategyCorp undertook the following activities, which are summarized in the following slides:

- ✓ Conducted an environmental scan to better understand Ramara’s unique context, including:
 - Reviewing current recreation and library programming to understand current perceptions of duplication;
 - Ramara’s budget trends for these services;
 - Ramara’s budget for these services compared to its peers; and
 - Ramara’s demographic considerations.
- ✓ Illustrated three level scenarios for the future of recreation and library services in Ramara. StrategyCorp chose to illustrate what maintaining the status quo looks like to demonstrate the importance of setting a new direction for these services.

1

Maintain the Status Quo

2

Strategic Option 1: Invest in Recreation and Library Services

3

Strategic Option 2: Subsidize Orillia Library Services and Invest in Recreation

Recreation and library have few cases of program duplication

StrategyCorp undertook a review of the types of programming offered by the recreation department and library and capacity levels, where provided. StrategyCorp also interviewed recreation department staff, the Library CEO, and the Library Board to better understand the history between the two departments and what may be contributing to the perception of duplication. StrategyCorp did not engage residents for this review.

Based on the review of program offerings by both departments, StrategyCorp has uncovered the following insights:

- 1 Adult programming:** The popular adult programming appears to be quite different between the two departments. Recreation typically focuses on physical activity or art classes with programming that is spread out over the course of a few weeks, whereas the library's programming is typically a one-evening event—though there are some standing, weekly groups at the library, such as the quilting club. While there are some specific examples of overlap - knitting and essential oils are two commonly noted examples - the adult and senior programming is quite different between the two departments, primarily because of the differences in the length of the programs (seasonal vs. one evening). *See Exhibits A and C on Slides 43, 45.*
- 2 Youth programming:** More overlap is seen in the youth programming. Both departments offer March break days, PA days, drop-in programs, and single-evening/day programs. However, the youth programming is a small percentage of the Ramara recreation department's participants—Ramara's recreational programming caters more to adults and seniors, which is reflective of Ramara's population. For youth sports, staff noted that Ramara residents tend to participate in programming delivered by external service providers who have partnerships with the Township (e.g. Ramara Soccer Club or JR NBA), or they go to neighboring municipalities who have facilities that can accommodate a wider variety of sports programming. *See Exhibits B and C on Slides 44, 45.*
- 3 Library programming:** An assessment of the library's program participants to total library patrons shows that in 2017, 2018, 2019, the percentage of people going to the library to participate in programs were 7%, 8%, and 9%, respectively. As such, the library's programming is a small percentage of the scope of its work. *See Exhibit C on Slides 45.*
- 4 Both the recreation department and the Library CEO noted that, historically, the recreation department has focused on programming that was more physical in nature, such as exercise programs, while the library has focused on educational and cultural programs. The duplication—while still small—has become more prominent in more recent years.**

Exhibit A: Ramara's Adult Recreation Programming

Provided below are tables of the adult programming that *met minimum enrollment requirements* and the capacity based on max capacity of the course. This data is from the "Fall 2017, 2018, 2019 Adult Programs" and "Spring 2018, 2019, 2020 Programs" documents. Given COVID-19 limitations, StrategyCorp excluded Spring 2020 numbers from the analysis.

Year	Activity	Capacity
2019	Acrylic Landscape Painting	125%
2018	Pickleball	123%
2019	L.E.A.D.S. Program for Seniors	118%
2017	Acrylic Landscape Painting	113%
2017	Yoga Tuesdays	111%
2019	Pickleball	111%
2018	Knit One, Purl Too	110%
2019	Sign Language	110%
2018	Pickleball	107%
2018	Yoga Thursdays	106%
2018	Yoga Tuesdays	106%
2019	Yoga Plus	106%
2019	Yoga Thursdays	105%
2019	Yoga Thursdays	105%
2018	L.E.A.D.S. Program for Seniors	102%
2017	Yoga Thursdays	100%
2018	Animal Spirit Guide	100%
2018	Yoga Tuesdays	100%
2019	Tai Chi	100%
2019	Crochet - Beginners & Advanced	100%
2019	Knit One, Purl Too!	100%
2019	Yoga Tuesdays	100%
2019	Zumba Wednesdays	100%
2019	Acrylic Landscape Painting	100%
2019	Yoga Tuesdays	100%
2017	Pickleball	97%
2018	Yoga Plus	94%
2019	Zumba Wednesdays	94%
2019	Pickleball	93%
2018	Yoga Thursdays	90%
2019	Learn to Play The Guitar	90%
2019	Wellness Coaching Series	90%
2017	Zumba Gold	87%
2018	Zumba Gold	87%

Year	Activity	Capacity
2018	Yoga in Brechin	83%
2018	Acrylic Landscape Painting	81%
2017	Michele's Art Social - December	76%
2018	Acrylic Landscape Painting	75%
2019	Animal Spirit Guide	75%
2019	L.E.A.D.S. Program for Seniors	74%
2018	Ballroom Line Dancing	72%
2018	Zumba Tuesdays	72%
2018	Social Ballroom Dancing	71%
2017	Crochet	70%
2019	Crochet - Beginners & Advanced	70%
2019	Tai Chi	69%
2017	Zumba Tuesdays	67%
2018	Social Ballroom Dancing	67%
2019	6' Wood Sign Painting Workshop	67%
2019	Ballroom Line Dancing	67%
2019	Yoga in Brechin	67%
2019	Zumba Tuesdays	67%
2019	Yoga Plus	61%
2018	Zumba Tuesdays	61%
2017	Knit One, Purl Too!	60%
2018	Yoga in Brechin	60%
2019	Yoga in Brechin	60%
2019	Zumba Tuesdays	58%
2019	Beginner Vinyasa Yoga	56%
2017	Zumba Wednesdays	50%
2018	Crochet - Beginners & Advanced	50%
2018	Yoga Plus	50%
2019	Tibetan Singing Bowls Workshop	45%
2019	Wood Sign Workshop	45%
2017	Yoga Plus	44%
2018	Crochet - Beginners & Advanced	42%
2019	Energetic Shielding	30%

Table 2

The below programs are missing minimum and maximum enrollment numbers and, therefore, their capacity cannot be accurately calculated.

Year	Activity	Min. Enroll	Max. Enroll	Enroll	Waitlist
2017	Lagoon City Pickleball			10	0
2017	Ramara Scraps - November	5		6	0
2017	Ramara Scraps - October	5		5	0
2018	Introduction to Tai Chi	6		11	0
2018	Lagoon City Pickleball			11	0
2018	Michele's Paint Night	10		10	0
2018	Ramara Crafts	5		5	0
2018	Zumba Wednesdays	7		12	0
2019	Lagoon City Pickleball			9	0
2018	Knit One, Purl Too	7		7	0
2018	Lagoon City Pickleball			12	0
2019	Lagoon City Pickleball			5	0



- From Fall 2017- Fall 2019, approximately **1158 adults** participated in Ramara recreation programs. This number assumes that courses that did not meet minimum enrollment did not take place and assumes that the programs in Table 2 above did take place.
- Based on these numbers, **most popular recreation includes physical activities** like yoga, Zumba, and pickleball and **art courses** like acrylic landscaping, knitting, and crocheting. Many of these programs are over capacity.

Exhibit B: Ramara's Youth Recreation Programming

Provided below are tables of the youth programming that met minimum enrollment requirements and the capacity based on max capacity of the course. This data is from the "Fall 2017, 2018, 2019 Youth Programs" and "Winter 2017, 2018, 2019, 2020 Youth Programs" documents. Given COVID-19 limitations, StrategyCorp excluded Spring 2020 numbers from the analysis. StrategyCorp was not provided with summer program data.

Year	Activity	Capacity
2018	Hallowe'en PA Day	225%
2019	Kinder Dance	113%
2018	PA DAY Babysitting Course (Babysitting)	106%
2017	Hunter Safety	100%
2017	PA DAY Babysitting Course (Babysitting)	100%
2018	Christmas Party	100%
2019	Hunter Safety	92%
2017	Recreation Nation	86%
2018	Recreation Nation	86%
2019	Recreation Nation	86%
2018	Recreation Nation	79%
2019	Recreation Nation	79%
2017	Go Girls Fitness	73%
2019	Sign Making for Kids	60%
2018	Escape PA Day JR 10-11 am	50%
2018	Safe At Home	50%
2019	PA Day Camp	50%
2019	March 1st- PA Day Olympics	50%

Table 2
The below courses are missing minimum and maximum enrollment numbers and, therefore, their capacity cannot be accurately calculated.

Year	Activity	Min. Enroll	Max. Enroll	Enroll	Waitlist
2017	Safe At Home	5		7	0
2018	Leadership Program	6		6	0
2017	Babysitter Training Course	8		11	0

For youth sports programming, staff noted that residents typically participate in non-profit providers' programs (formal agreements with Ramara Township) or travel to neighbouring municipalities. These include:

Ramara:

- **Basketball:** JR NBA
- **Swimming:** Pauline Barratt Aquatics
- **Soccer:** Ramara Soccer Club
- **Playgroup:** EarlyON

Outside Ramara:

- **Skating:** Beaverton, Orillia, Rama
- **Curling:** Orillia, Beaverton
- **Hockey:** Orillia, Rama
- **Swimming (Lessons):** Orillia
- **Baseball:** Orillia
- **Basketball:** Orillia, Rama
- **Volleyball:** Orillia, Rama
- **Trails:** Orillia (paved)
- **Tennis:** Orillia
- **Skatepark:** Orillia, Beaverton
- **Lacrosse:** Orillia
- **Fitness Center:** Orillia, Rama
- **Splash pad:** Orillia



- From Fall 2017-Fall 2019, approximately **210 youth** participated in Ramara recreation programs. This number assumes that courses that did not meet minimum enrollment did not take place and assumes that the programs in Table 2 did take place. As noted, this does not include summer programming data.
- Ramara's **most popular youth recreation programming** appear to be **one-day events** like PA days holiday parties/dances, and some training courses.

Exhibit C: Ramara's Library Programming

Provided below are a few examples of the different types of programming that the library provides for Ramara residents. Additionally, StrategyCorp has provided the number of programs provided at each branch and the number of participants for 2017-2019.

Examples of Library Programming		
Babies/Toddlers/Children		
PA Days	March Break	Holidays
Homeschooling support	Homework Help	I Spy Science
Public School Class Visits	Student/Senior Pen Pal Club	Car Seat Clinics
Halloween Costume Exchange	Nuts for Nature	Support Group for Parents with Exceptionalities
Fun in the Sun	Techin' in Brechin	Hereos of Ramara
Teenagers		
March Break	PA Days	Summer Reading Clubs
Homework Help	Colour Me Zen	Poetry Contest
Prom Dress Swap	Virtual Escape Room	Art with Masters
Sunshine Scrappers	Literacy Day Activities	Beat Boredom Blues
Adults/Seniors		
IPad, eBook, Internet and Email Training	Understanding Vaping	Women's Natural Health
Various gardening workshops	Elder Meditation Workshop	Medium, Shannon Taylor
Make & Take Essential Oils	Cannabis 101	Valentine's Day Blind Date
Cathedral Windows Quilt Class	What's New in Astrology	Colouring & Conversations
Hearing & Hearing Loss	HTML & CSS for Adults	Numerology – Your Birth Date and 9 Year Life Cycle
Regular Adult Clubs		
Quilting Club	Friends of the Library	Trivia Night
Fibre Friends	Book Clubs	Volunteering

Branch	Year	Number of Programs	Participants per Branch
Atherly	2017	270	1995
	2018	264	2289
	2019*	241	2518
Brechin	2017	112	145
	2018	172	396
	2019*	53	204
Total	2017	382	2140
	2018	436	2685
	2019	294	2722

Branch	2017	2018	2019	YoY %
Total Patrons	30,382	31,838	30,053	-0.36%
Participants in Programs	2,140	2,685	2,722	9.07%
Program Participants/Total Patrons	7%	8%	9%	



- From 2017-2019, approximately **7,547 people** participated in library programs. 90% of these patrons participated in programs at the Atherly Branch inside the Ramara Center.
- The library's **programming for children and teenagers** appear to be primarily **one-day events and activities**, along with some schooling support. This type of one-day programming appears to be similar to what Ramara's recreation services provides.
- Ramara's adult programming at the library appears to be primarily one-day events, which **is different from recreation's seasonal programming**.
- Ramara library's programming patrons are a small percentage of its overall patrons.

* December 2019 data not provided

What are the primary challenges for the recreation department and library when it comes to programming?

Based on quantitative and qualitative research, StrategyCorp believes that the challenges between these two departments when it comes to programming can be distilled down into the following four points:



Lack of communication between the two departments. Both departments acknowledged that they do not currently work together on developing programming for the community—they do not collaborate with each other for program planning, and they do not have strong communications with each other as well. Historically, the programming has remained distinct, so this lack of collaboration and communication did not present major issues, but in recent years, it has become more of a problem.



Neither department has the best facilities for what they want to offer. The recreation department is limited in the types of youth programming they can offer because the Ramara Centre has some space limitations (e.g. low ceilings, concrete floors). For example, there are limited opportunities for sports in particular, so families go outside Ramara for recreational sports, or sports programming is offered by an external partner organizations who use Township fields, schools, etc. The library also is limited in its offerings because it has limited space in the Ramara Centre, and the Brechin Branch is also small and not purpose-built. They do not have space for educational programs like tutoring, literacy programs, etc., and many adult programs take place in the children's section of the library. Furthermore, the library often has to turn away residents from programs because space is small. As a result, these two departments may end up offering similar programming because they are limited with their space.



Recreation and library are competing in the same “markets.” Staff noted that resident demand influences the type of programming offered, and residents are likely demanding the same programming from both the recreation department and library. Because both departments do not collaborate with one another and because they share the same space (Ramara Centre), which is not purpose-built for traditional needs for recreation and library services, they follow resident demand, resulting in some similar programming.



Programming partly depends on available service providers and partnerships. Both the recreation department and library have strong partnerships in the community, and these service providers and volunteers are the ones who deliver programming. The library does not have programming staff—some staff do provide some educational programming (e.g. the children's librarian), but its programming is primarily offered by volunteers or service providers who are funded by special fundraising programs within the library (e.g. Friends of the Library). As such, some of the more recreational programming the library offers is driven by resident demand and volunteers who can offer it.

Ramara needs a new vision for these services

The recreation department and library stated that in recent years, they have undertaken a number of initiatives to advance and transform their departments but have lacked direction and support from Council to implement plans. The recreation department undertook a Recreation and Parks Master Plan (2012) and a Space Needs Study (2019) that have not been acted upon, and the Library Board has put forward expansion plans that required minimal financial support from the Township, but they have not been approved. As Council considers setting a new vision for recreation and library services in the Township, it should consider the following:

- **Demographics:** Ramara is a rural community with an older population whose growth rate is behind the County's and province's growth rates (see Slide 48). This leads to two considerations:
 - Recreation and library services are important channels for older residents in rural locations to create community, and
 - If Ramara wants to attract growth to the area, strong recreation and library programming need to be a part of that vision.
- **Budget Considerations:** Ramara's recreation and library budgets are a small percentage of the budget (see Slide 49), and the opportunity to find savings is very limited for two reasons:
 - The recreation department and library grant in the 2020 budget were 2.0% and 1.6% of the budget, respectively. Even if Ramara were to completely eliminate these departments, the savings would be a small fraction of the Township budget.
 - There are limited savings opportunities in programming. 28% of Ramara's recreation budget is spent on programming (approximately \$130,000 in Budget 2020), and the department recovers 50% of programming costs through fees, which is the highest recovery rate among its peers. Ramara's library department spends only 0.4% of its budget on programming. This is partly because many of the library's programming is provided by volunteers or is funded by specific fundraising through groups like the Friends of the Library. Ramara's library's primary costs are wages and rent. It has two full-time staff members and four part-time staff members and relies on 40 volunteers. Given that less than 10% of patrons go to the library for programs (see Slide 45), it is important to recognize these six staff members provide *library* services to over 28,000 patrons per year.
- **Peers:** Ramara does spend more on these services compared to its peers, but it is important to consider how economies of scale, recovery rates, and user trends impact budgeting decisions on these services.
- **Community Perceptions:** Both departments are loved by the community and play an important role in the culture of the Township. The recreation department's programs are in high demand, and the library continues to get good reviews and has strong influence in the community. Based on the data on programming outside the Township, there are limited private and non-profit recreation and leisure providers in the Township, and the recreation and library departments' programming are places to develop community in the Township, especially for seniors.
- **Policies that Promote Collaboration:** As an immediate next step while Council develops a new vision for these services, the library department and recreation department need policies that require them to undertake program planning activities together so that they can maximize the value they provide to the community, and the library should be more involved in Township planning and communications. This is further described on Slide 58.

On Slides 53-56, StrategyCorp will illustrate the following three scenarios:

1

Maintain the Status Quo

2

Strategic Option 1: Invest in Recreation and Library Services

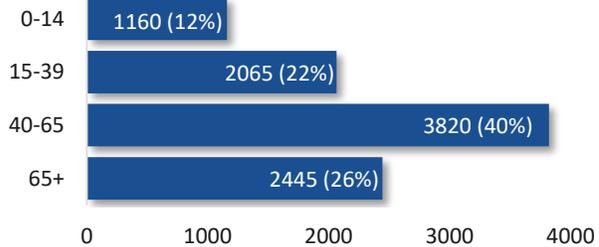
3

Strategic Option 2: Subsidize Orillia Library Services and Invest in Recreation

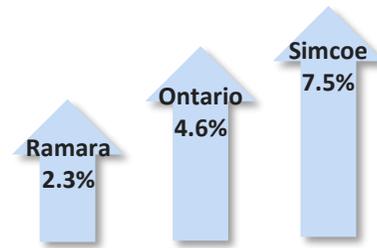
Ramara's population is older, and its growth rate is below average

Ramara's Demographics Trends

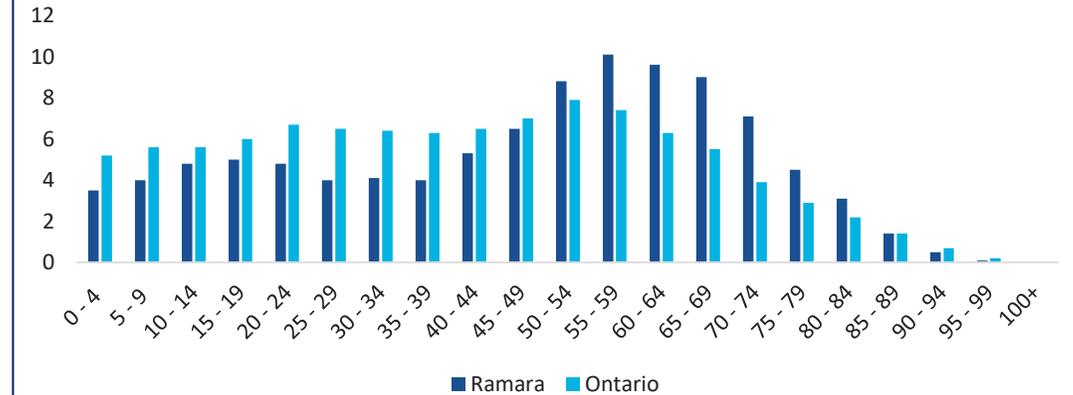
Ramara's Age Groups – Total (%)



Growth Rates (2011-2016)



Age Groups by % of Population



Public Library and Recreation Programs Contribute to the Wellbeing of Seniors in Rural Areas

- Ramara's library and recreation services are important channels for seniors to create community in a rural area. Ramara has a significantly older population compared to the provincial average with a quarter of its population over 65. The McMaster Institute for Research on Aging argues that "public libraries play a significant role in meeting the educational, informational, cultural, recreational, health, and social-care needs of older adults."¹ Rural libraries, including Ramara's, have adapted to become community hubs in response to changing library trends, offering educational courses, leisure activities, and digital services. The recreation department also offers age-friendly physical activities, like yoga, Zumba, and pickleball, which are important in supporting seniors' physical and mental health and sense of community. Proximity to services is an important consideration for seniors who may choose to participate in programs or services based on ease of mobility or transportation. As Ramara's Council creates its vision for recreation and libraries in the Township, it must keep these considerations in mind.



Library and Recreation Must be Considered in Future Growth Plans

- Ramara not only has an older population, but its growth is half of the province's average growth rate and is nearly a third of Simcoe County's average. If Council wants to attract more growth to the area from an economic development perspective, it will need to include recreation and libraries as part of that vision. A 2018 study from the National Recreation and Parks Association (USA), which surveyed 70 parks and recreation leaders and business practitioners across the US, found that recreations departments shape quality of life, and high quality of life attracts workers, which attracts employers, which attracts more investment and jobs.²
- Even beyond the role that recreation and libraries play in economic development, Ramara will need to consider how it can attract young generations to the area in the post-COVID-19 era in which people are no longer bound to a geographic location for work—it will be necessary to consider how recreation and library services play a role in that effort to attract residents to the Township.

1. <https://www.mcmasteroptimalaging.org/blog/detail/blog/2018/08/01/public-libraries-community-hubs-responding-to-the-needs-of-older-adults>
 2. <https://www.nrpa.org/siteassets/nrpa-economic-development-report.pdf>

Recreation and library services are small budget items with limited savings opportunities

Recreation Department Budget Breakdown (Excluding Trails)					
	2018 Budget	2019 Budget	2020 Budget	% of 2020 Budget	YoY %
Salaries and Benefits	\$ 161,000	\$ 196,558	\$ 253,192	54%	19%
Contracted Services	\$ 38,500	\$ 44,500	\$ 51,800	11%	12%
Building Maint./Insurance	\$ 18,000	\$ 15,500	\$ 15,500	3%	-5%
Materials	\$ 4,800	\$ 5,000	\$ 6,400	1%	11%
Programming	\$ 98,205	\$ 133,585	\$ 130,154	28%	11%
Training/Conferences	\$ 3,800	\$ 4,500	\$ 4,000	1%	2%
Other	\$ 3,200	\$ 5,600	\$ 5,850	1%	28%
Total	\$ 327,505	\$ 405,243	\$ 466,897	100%	14%

Library Department Budget Breakdown					
	2018 Budget	2019 Budget	2020 Budget	% of 2020 Budget	YoY %
Salaries and Benefits	\$ 300,300	\$ 334,200	\$ 314,612	69.1%	2%
Contracted Services	\$ 4,000	\$ 3,000	\$ 3,000	0.7%	-8%
Rent, Insurance	\$ 87,800	\$ 88,000	\$ 86,300	18.9%	-1%
Advertising/Comms	\$ 13,200	\$ 10,100	\$ 11,200	2.5%	-5%
Programming	\$ 1,600	\$ 1,700	\$ 1,800	0.4%	4%
Training	\$ 4,000	\$ 3,000	\$ 3,000	0.7%	-8%
Volunteer Appreciation	\$ 1,000	\$ 1,000	\$ 1,000	0.2%	0%
Subscrip/Memberships	\$ 600	\$ 600	\$ 600	0.1%	0%
Misc.	\$ 1,500	\$ 1,500	\$ 1,500	0.3%	0%
Capital	\$ 34,300	\$ 31,500	\$ 32,500	7.1%	-2%
Total	\$ 448,300	\$ 474,600	\$ 455,512	100.0%	1%

Recreation and Library Expenses as % of Township Budget					
	2018 Budget	2019 Budget	2020 Budget	YoY %	
Recreation	\$ 327,505	\$ 405,243	\$ 466,897	14.2%	
(% of Budget)	(1.7%)	(1.8%)	(2.0%)		
Library Grant	\$ 404,230	\$ 440,030	\$ 388,041	-1.3%	
(% of Budget)	(2.0%)	(2.0)	(1.6%)		
Township Budget	\$ 19,843,642	\$ 22,042,734	\$ 23,644,058	6.4%	

When looking for opportunities for savings in recreation and library programming, it is important to consider the following:

- In the 2020 budget, recreation was 2.0% of the budget, and library's grant was 1.6%. This is a very small proportion of the Township's budget, and any savings in these areas (even if either department was completely eliminated) will be quite small.
- In recreation's 2020 budget, salaries and benefits were 54% of expenses, and programs were 28%. However, in the 2020 budget, recreation will recover approximately 50% of programming costs through fees.
- In the library's 2020 budget, wages and benefits were 69% of expenses, and programming were 0.4%. Programming is a small percentage of the library's expenses because (1) programming is primarily led and offered by volunteers and (2) the library's fundraising groups fundraise for particular programs.

Given these considerations, savings in these two areas will be limited.

Ramara spends above average on recreation and library services compared to its peers

Recreation and Library Expenses Across Peer Municipalities – 2019 Budgets					Average
	Ramara	Severn	Tay	Tiny	
Recreation Services	\$ 405,243	\$ 198,880	\$ 175,072	\$ 516,095	\$ 323,823
(% of Budget)	(1.8%)	(0.4%)	(1.0%)	(2.3%)	(1.4%)
Library Grant	\$ 440,030	\$ 232,484	\$ 444,678	\$ 184,026	\$ 325,305
(% of Budget)	(2.0%)	(0.5%)	(2.6%)	(0.8%)	(1.5%)
Rec/Library as % of Budget	(3.8%)	(0.9%)	(3.7%)	(3.1%)	(2.9%)
Total Budget	\$ 22,042,734	\$ 47,581,107	\$ 16,926,210	\$ 22,603,000	\$ 27,288,263
Number of Libraries	2	1	3	0	
Active Card Holders (2018)	2019	867	2179	-	
Card Holders as % of Pop. (2018)	25%	7%	22%	-	

StrategyCorp conducted an analysis of Ramara's 2019 budget compared to its peers. In order to ensure that similar data was compared, StrategyCorp looked at peer municipality budgets and only included expenses for line items that matched Ramara's—for example, park maintenance expenses were excluded, community board grants were excluded, capital was excluded, etc. Library data is taken from 2018 Ministry data (latest data available). The following insights should be considered when Council assesses which direction to take with recreation and library services in the Township:

- Ramara's recreation expenses as a percentage of its budget (1.8%) is above average compared to Simcoe peers, but, in 2018, it had the highest recovery rate for recreation services compared to its Simcoe peers.¹
- Ramara's library grant is above average compared to its peer municipalities. However, Tiny's library services are provided by neighbouring municipalities. Severn spends less on its library grant as a percentage of its budget but has only one library branch. Tay spends more on its grant as a percentage of its budget compared to Ramara and has three branches despite having less active cardholders as a percentage of its population.
- Ramara's combined recreation expenses and library grant as a percentage of the budget (3.8%) is above average and is the highest among its peers.

1. Township of Ramara Service Delivery Review: Current State Report. Data taken from 2018 FIR data.

Residents love recreation and library services and want improved cultural and recreation facilities

Findings from the 2016 “Business, Retention, and Expansion (BRE)” Report by Orillia, Oro-Medonte, Ramara, Severn, and Rama First Nations

TOP THREE LOCAL GOVERNMENT SERVICES RATED EXCELLENT BY AREA

ALL REGIONS	ORILLIA	ORO-MEDONTE	RAMA	RAMARA	SEVERN
PARKS AND OPEN SPACES	PARKS AND OPEN SPACES	PARKS AND OPEN SPACES	POLICE SERVICES	FIRE SERVICES	FIRE SERVICES
FIRE SERVICES	FIRE SERVICES	SNOW REMOVAL	FIRE SERVICES	POLICE SERVICES	PARKS AND OPEN SPACES
POLICE SERVICES	LIBRARY SERVICES	GARBAGE/ RECYCLING	RECREATION FACILITIES	LIBRARY SERVICES	SUPPORT FROM LOCAL RESIDENTS

TOP THREE LOCAL GOVERNMENT SERVICES RATED POOR BY AREA

ALL REGIONS	ORILLIA	ORO-MEDONTE	RAMA	RAMARA	SEVERN
PUBLIC TRANSIT	RECREATION FACILITIES	PLANNING, ZONING AND OTHER PERMITS	PUBLIC TRANSIT	CULTURAL FACILITIES	PUBLIC TRANSIT
PLANNING, ZONING AND OTHER PERMITS	PLANNING, ZONING AND OTHER PERMITS	LIBRARY SERVICES	PLANNING, ZONING AND OTHER PERMITS	RECREATION FACILITIES	RECREATION FACILITIES
RECREATION FACILITIES	STREET/ROAD REPAIR	PUBLIC TRANSIT	HEALTH DEPARTMENT/ HEALTH UNIT APPROVALS	PUBLIC TRANSIT	ECONOMIC DEVELOPMENT SERVICES

89% of respondents stated that quality public library services were “**very important**,” and 11% stated they were “important.”

93% stated that library staff provided **excellent** services.

67% of respondents stated that the library could benefit from **additional space** for programs and activities.

The Board and Committee Review concluded that the recreation department has run out of space for programming due to high demand. They currently use the Ramara Centre, public schools, YMCA Geneva Park, Atherly Fire Hall, Brechin Community Centre, Council Chambers (for yoga and Zumba), among other locations.

Findings from the 2019 Library Survey (over 400 responses) and Board and Committee Review

- Ramara’s recreation programming exceeds capacity across a variety of programs, and due to lack of sufficient space, the department provides programming across the Township through partner facilities. In the 2016 BRE report, Ramara residents noted that the Township needs new cultural and recreational facilities.
- Ramara’s library also receives high praise for their services and were identified as one of the top three services in Ramara.
- These findings are not new to Council or the administration—both recreation services and the library noted that they continue to bring forward statistics on their high demand and positive perception in the community, but they continue to be denied support. As Council considers a new direction for recreation and library services, these community/public policy considerations need to be factored into its decision.

Options Overview and Assumptions

In the following slides, StrategyCorp will illustrate the future of recreation and library services in Ramara:

1

Maintain the Status Quo

2

Strategic Option 1: Invest in Recreation and Library Services

3

Strategic Option 2: Subsidize Orillia Library Services and Invest in Recreation

In order to conduct projected costs and savings, StrategyCorp made a number of assumptions:

- Ramara's budget grew 6.4% YoY from 2018-2020. StrategyCorp assumes a consistent 6.4% YoY growth from 2021-2030 for all options.
- In the absence of a strategic plan and strategy for these services, Ramara will continue to **Maintain the Status Quo**. StrategyCorp assumes that the library grant will continue to decrease by 1.3% (2018-2020 YoY rate) and that the recreation budget will continue to increase by 14.2% (2018-2020 YoY rate).
- For **Strategic Option 1: Invest in Recreation and Library Services**, StrategyCorp assumes that allocating 5% of the budget towards recreation and library services (i.e. Township library grant), split evenly between these two services, would be considered an investment in these services. It is important to note that such an investment make Ramara an outlier among its peers. This number was chosen for the purpose of envisioning what an investment could look like.
- For **Strategic Option 2: Contract Orillia for Library Services**, Ramara's active cardholders increased by 6.8% YoY from 2016-2018. StrategyCorp assumes a 6.8% YoY growth from 2019-2030. Additionally, Orillia's cost/cardholder was \$42.00 in 2018, \$43.05 in 2019, and is planning to increase by 5% YoY beginning in 2020, according to Oro-Medonte's 2020 Budget, who contracts Orillia for library services. StrategyCorp assumes a consistent 5% YoY growth rate for Orillia cost/cardholder from 2020-2030.
- These scenarios do not consider the future of Ramara's four community halls. Though Ramara only spends around 0.2% of its budget on operational expenses for the community halls, the recent Board and Committee Review made the following recommendation:
 - *"Facility appraisal on Longford and Udney Halls to determine feasibility in the next 5, 10 or 20 years. At 55 to 60 years old, it is anticipated that both halls will require some costly upgrades to keep in line with the OBC and AODA standards as well as implementations of current and future measures that are being identified due to COVID19. If deemed prohibitive to repair, the board/committee responsible would face disbanding. The Township should be prepared if the Community Centre Board members no longer want to participate as volunteers when the current pandemic is over or if/when policies and procedures are deemed mandatory in the operation of the facilities."*
 - Decisions made on these assets (repairing, repurposing, or selling) should be considered when determining a new vision for recreation and library services.

Summary of Scenarios

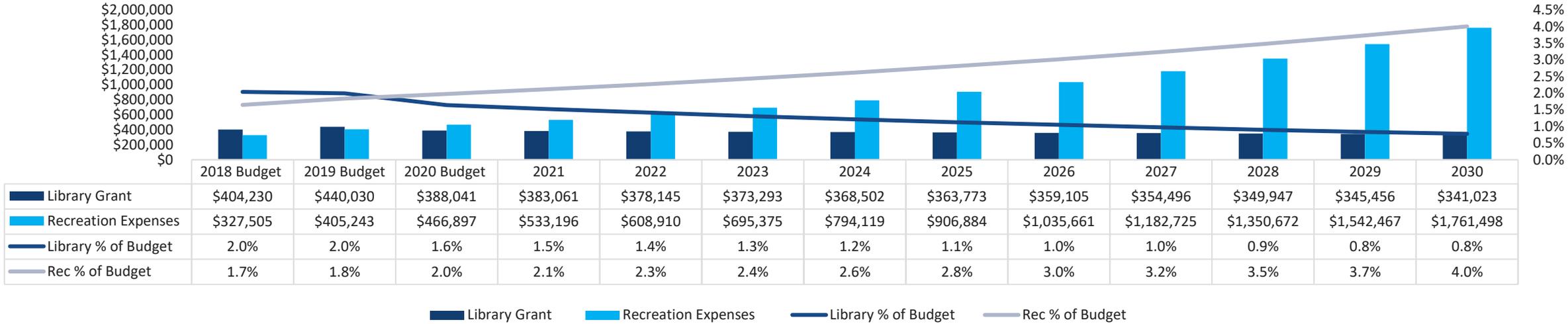
Total Recreation and Library Services Costs to Township



Considerations	Maintain Status Quo	Strategic Option 1: Invest in Recreation and Library Services	Strategic Option 2: Subsidize Orillia Library Services and Invest in Recreation
Option Overview	<ul style="list-style-type: none"> 6.4% Increase in Township Budget 1.3% Decrease in Library Grant 14.2% Increase in Recreation Expenses 	<ul style="list-style-type: none"> 6.4% Increase in Township Budget 2.5% of Budget Towards Library Grant 2.5% of Budget Towards Recreation Services 	<ul style="list-style-type: none"> 6.4% Increase in Township Budget 0.5% of Budget to Contract Orillia for Library Services 2.5% of Budget towards Recreation Services
Capital	<ul style="list-style-type: none"> Recreation and library will continue to have spacing challenges and will continue to turn residents away from programs 	<ul style="list-style-type: none"> New library with Ramara Historical Society Sell or repurpose Brechin Medical Centre as a community hub Art and theatre programming space and media space in Ramara Centre 	<ul style="list-style-type: none"> Sell or repurpose Brechin Medical Centre as a community hub Ramara Centre fully repurposed and renovated for recreation programming
Programming	<ul style="list-style-type: none"> Programs will be “stale and redundant” Residents will participate in programs outside the Township Ramara will lose talented staff 	<ul style="list-style-type: none"> New recreation programming, such as theatre and dance New library programming, such as new digital programs (and staff training), education support for students New digital library collections 	<ul style="list-style-type: none"> Recreation service options will increase and recreation will take over some library services like technology support
Public policy considerations	<ul style="list-style-type: none"> Residents will continue to use and value these services, but they may be more vocal in demanding change 	<ul style="list-style-type: none"> Residents have sought improved recreation and library space and programming for years and investing in these services will likely be seen as a political win for Council 	<ul style="list-style-type: none"> Residents will likely be unhappy with this decision

Maintain the Status Quo

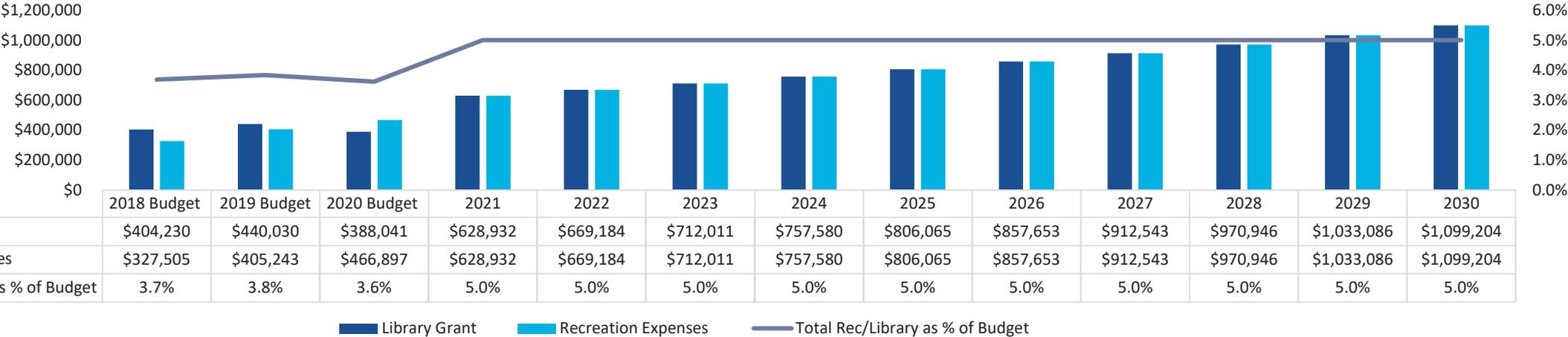
Recreation Services and Library Grant Projection with 2018-2020 YoY Growth Rates



Strategic Considerations	Recreation Services	Library Services
Overview	From 2018-2020, the recreation budget grew 14.2% YoY due to increases in salaries and benefits (hiring of a youth recreation coordinator), programming, and contracted maintenance services. Maintaining the status quo assumes similar trends in expenditure growth on average, year over year.	From 2018-2020, the library grant decreased by 1.3% YoY. It grew from 2018 to 2019, but in 2020, Council significantly reduced the grant. Maintaining the status quo assumes Council will continue to cut its library grant. This will force the library to increase fundraising efforts, but given the current level of fundraising, it will likely be unable to close the gap.
Capital	If Council continues to not support capital improvement opportunities for the recreation department, the department will continue to be limited in the types of programs it can offer. Competition for space between recreation and library will continue.	The Brechin branch will continue to be suboptimal space because of limitations in capital improvement opportunities, and the recreation department and library will continue to compete for space in the Ramara Centre. The library will continue to turn away patrons and program participants.
Programming/Services	<ul style="list-style-type: none"> Programs will be redundant and space-dependent instead of resident-driven. The department may lose talented staff who feel that their work is redundant and has no opportunities for growth and development. 	<ul style="list-style-type: none"> Ramara’s library will not be able to offer the forward-thinking programs and services (e.g. digital literacy). The library may cut staff and/or lose talented staff who feel that their work is redundant and has no opportunities for growth and development.
Public Policy	Staff noted that residents will continue to use programming outside the Township, and younger generations interested in moving to Simcoe County may not be attracted to Ramara because of its limited recreation opportunities.	If the library grant continues to decrease and impacts library services and programming, the Library Board noted that Ramara residents who love and use the library will likely become more vocal about their frustrations with cuts. Younger generations interested in moving to Simcoe County may not be attracted to Ramara if there is limited children’s programming space.

Option 1: Invest in Recreation and Library Services

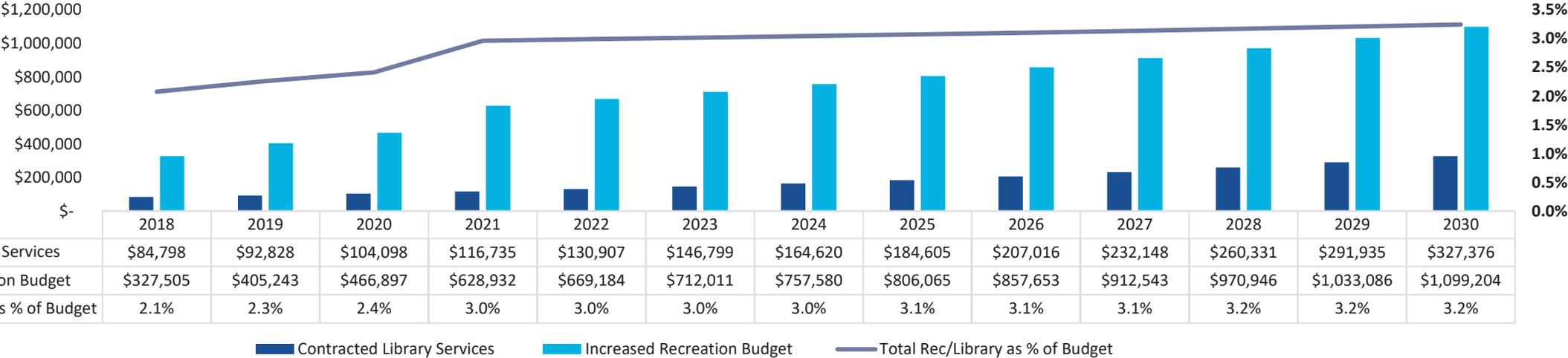
Increased Recreation Services and Library Grant



Strategic Considerations	Recreation Services	Library Services
Overview	StrategyCorp proposes that Ramara spend 2.5% of its budget on recreation services as a way to envision what an investment in recreation services could look like.	StrategyCorp proposes that Ramara spend 2.5% of its budget on its library grant as a way to envision what an investment in library services could look like.
Capital	Capital improvement opportunities include: <ul style="list-style-type: none"> • Studio space for yoga , Zumba (currently in Council chambers due to COVID-19), dance and theatre • Weight room/fitness centre • Art studios and/or “maker spaces” • Media spaces like soundproof rooms for music, host online programming 	Capital improvement opportunities include: <ul style="list-style-type: none"> • Building a new library branch with the Ramara Historical Society • Separate adult and youth library and programming space • Rooms for tutoring, literacy programs, exam proctoring, art showcases • Selling the Brechin Medical Centre or repurposing the building for other uses
Programming/Services	<ul style="list-style-type: none"> • New dance and theatre programs for youth • New fitness courses like weight training for adults and youth 	<ul style="list-style-type: none"> • Accommodate more patrons for current services and programming • Add more Science, Technology, Engineering, Art, and Math (STEAM) programming for youth • Enhance digital and regular collections at both branches • More community partnerships • New digital programs and staff training for digital programs • More education programs and support for students and parents
Public Policy	In past studies, residents noted that recreation and cultural facilities are one of the top priority areas for improvement in Ramara. Supporting small investments in the recreation department and capital improvements would likely be seen a political win for Council, and it could contribute to a more vibrant community that younger generations are attracted to.	Staff and past studies/surveys noted that residents desire improved space for the library and value the library’s programs and services. Investing in the library would likely be seen a political win for Council, and it could contribute to a more vibrant community that younger generations are attracted to.

Option 2: Contract Library Services and Invest in Recreation Services

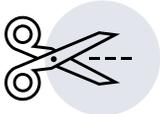
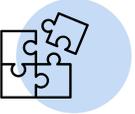
Contracted Library Services and Increased Recreation Services



Strategic Considerations	Recreation Services	Library Services
Overview	StrategyCorp was advised to explore what contracting out library services and increasing the recreation budget could look like. StrategyCorp assumes that in this scenario, 2.5% of the budget will go to recreation services. The impact of this investment is the same as in Option 1.	If the library were to eliminate its own library services and subsidize cardholders at Orillia, it would spend 0.5% of its budget on library services for residents in 2021, saving approximately \$266,326. Due to 5% increases in Orillia’s card costs, this number would be 0.7% of the budget by 2030.
Capital	Capital improvement opportunities include: <ul style="list-style-type: none"> • Studio space for yoga , Zumba (currently in Council chambers due to COVID-19), dance and theatre • Weight room/fitness centre • Art studios and/or “maker spaces” • Media spaces like soundproof rooms for music, host online programming 	Under this scenario, the Township could sell or repurpose the Brechin Medical Centre and repurpose the Ramara Centre provide recreation programming only.
Programming/Services	<ul style="list-style-type: none"> • New dance and theatre programs for youth • New fitness courses like weight training for adults and youth 	With library services eliminated in the Township, the recreation department could provide some of the lost services, such as digital and technology needs (computers, WiFi, etc.), and could accommodate some of the library’s social groups, such as the Quilting Club and Fibre Friends.
Public Policy	In past studies, residents noted that recreation and cultural facilities are one of the top priority areas for improvement in Ramara. Supporting small investments in the recreation department and capital improvements would likely be seen a political win for Council, and it could contribute to a more vibrant community that younger generations are attracted to.	Ramara contracted Orillia for library services before its own library was established. 20 years ago, the Township determined that the need for library services was great enough to warrant its own library services. Residents may see this option as moving the Township backwards. Though residents will have access to library services through Orillia, eliminating library services in Ramara will harm seniors and low-income residents who may find driving to Orillia is a barrier to accessing a library.

Ramara should invest in recreation and library services

StrategyCorp recommends that the Township invest in both recreation and library services for the reasons outlined below. Given that in both scenarios, the recreation department's budget as a percentage of the Township budget is 2.5%, StrategyCorp's rationale for investing in both rests on the impact of (a) investing in library services compared to (b) eliminating this service and subsidizing residents to use Orillia. StrategyCorp argues that the benefits (savings) of eliminating library services will be outweighed by the costs—overall, eliminating library services will be a politically unpopular decision.

Point	Rationale
 <p>Savings will be limited</p>	<ul style="list-style-type: none"> The Township spends a small percentage of its budget on recreation and library services (3.6% combined in 2020) and increasing the funding to make recreation and library services to 5% of its budget could have a small impact elsewhere in the budget but will be significant for the recreation and library budgets individually. As described below, the savings generated from subsidizing residents to use Orillia's library services (1% savings in budget for Budget 2021) will likely be outweighed by the public's negative response to this decision.
 <p>Ramara's older and low-income residents will be negatively impacted</p>	<ul style="list-style-type: none"> As stated, Ramara has an older population, and the seniors who use the library services love the library, its staff, its programs/services and its ability to create community. Additionally, StrategyCorp understands that Ramara's Brechin Branch is in an area that is lower income compared to elsewhere in the Township and has strong partnerships with the nearby public school for education and literacy programs. While asking residents to drive to Orillia for library services may not seem like a large ask, seniors and low-income families may find transportation and the distance barriers to using these services.
 <p>The recreation department may not be able to successfully "absorb" what is lost</p>	<ul style="list-style-type: none"> The recreation department may be able to absorb some of the programs and services provided by the library department (e.g. technology assistance, space for social groups), but it is important to not understate the role that staff play in creating a culture and sense of community among patrons and volunteers. The recreation department could theoretically "absorb" the volunteers and partner with service providers who run library programming and services, but it is important to consider how the missions and operations of a recreation department are different from a library, and "absorbing" staff, volunteers, and partners may create cultural and change management challenges.
 <p>Reducing library services will harm future growth</p>	<ul style="list-style-type: none"> If Ramara wants to attract younger generations to the area and increase its population growth rate to be more in line with the County's and province's, it will need to seriously consider how recreation and library services play a role in this effort. "Hard" services are important for development and keeping residents happy, but they are not what attract people to an area. Businesses, entrepreneurs, families, and young adults are attracted to areas with a high quality of life, and libraries play an important role as community hubs for all generations. Ramara has struggled in recent years to attract development and growth to the area, and if this is a priority for Council, it is unlikely that cutting the library for minimal savings will advance this goal.

Short-term process recommendations

Through the current state phase, StrategyCorp heard that parks and recreation may be better optimized in the same department. After consulting staff on this issue and finding that most of Ramara's peers do not have parks and recreation in the same department, StrategyCorp recommends parks and recreation maintain their current organizational structure. However, policies that improve planning and communication between the two departments can help alleviate some of the problems with the current organizational structure.

Similarly, if Council chooses to maintain its library, the recreation and library departments should introduce a new policy on planning and communication between the two departments to promote collaboration, prevent programming duplication, and provide the most effective programs and services for residents.

These recommendations are described below:

<i>Planning and Communication between Recreation and Parks</i>	
Issue	<ul style="list-style-type: none"> The Parks Department sits within the Infrastructure Department, while the Recreation Department sits within Legislative and Community Services. This separation has contributed to a lack of coordinated planning and consistent communication between the two departments, which has resulted in parks and facilities maintenance activities becoming out of sync with recreation programming. The Parks Department follows a 2- to 3-week schedule for maintenance. The parks maintenance needs are not large enough to warrant a full team within the Recreation Department, and the parks maintenance team can be deployed to other Infrastructure Dept. projects when needed. In the past, the Ramara Trails Committee undertook activities on their own without the coordination of other departments and Council, which has resulted in the Committee needing to take full control of grants, trail maintenance, and trail development. Over the past couple of years, the coordination and communication has improved greatly between the Committee, staff and Council.
Process Improvement Ideas	<ul style="list-style-type: none"> The Recreation Department typically plans programming 6-8 months in advance. The administration should institute a policy that requires the two departments to meet seasonally to discuss plans and needed maintenance activities to ensure that facilities can be maintained according to programming plans as much as possible.
Additional Considerations	<ul style="list-style-type: none"> With Council implementing a new Strategic Plan and providing new direction for recreation programming, it will also be helpful for Council to provide direction for trails. The Trails Committee is following set plans and reports that have been done over the years, but Council will need to create a future look on trails in order for collaborative planning and partnerships to be created.

<i>Planning and Communication between Recreation and Library</i>	
Issue	<ul style="list-style-type: none"> As stated in previous slides in this initiative, the Recreation Department and Library Departments have historically provided separate programming, serving different purposes within the Township. While duplication in programming has been limited, it has become more pronounced in recent years. However, the two departments do not currently collaborate with one another on programming planning, and they both acknowledged that communications between the two departments could be improved.
Process Improvement Ideas	<ul style="list-style-type: none"> If Council chooses to maintain its library, as part of Council's new vision for recreation and library services, these two departments will need to agree on their separation of services and role they play in the Township. The administration should institute a policy that requires the two departments to meet quarterly (perhaps through a Community Services Roundtable) to discuss and collaborate on programming for the Township to reduce duplication and provide the most effective services and programs for residents.
Additional Considerations	<ul style="list-style-type: none"> The Recreation Department plans 6-8 months in advance, while the Library's planning has a shorter time span.



Appendix A: IT and IM Survey Findings

Survey Overview: Methodology and Assumptions

To better understand Ramara's current state of information technology and information and technology needs, StrategyCorp conducted a survey with directors and staff:

- All staff were sent the survey, including non-office-based staff in the Infrastructure Department. Excluding these staff members, there are 29 staff members who have Township office jobs and may have perspectives on IT and IM.
- Of these 29 individuals, 18 responded to the survey, including all 8 directors.

Within the survey, staff were to estimate time wasted on (1) processes that could be improved with IT improvements and (2) searching for information that could be better organized. In order to scale this feedback to a yearly total and associate a "productivity," or "light green dollars," savings total to each improvement opportunity, StrategyCorp made a number of assumptions:

- We assume that the average work week is 37.5 hours/week. This assumption was used for responses such as "I waste X *percentage* of time on Y process."
- We assume that the average employee works 47 weeks per year to account for vacation and statutory holidays.
- We use a median hourly rate to estimate light green dollars for confidentiality reasons. Ramara's median hourly rate is \$35.39
- Where ranges of time were given, we used the smaller end of the range.
- The Building Department worked on their survey together. They made statements such as "X wastes Y% of staff time." We applied such statements to all three members of the department.
- The Executive Services Department worked on their survey together. They made statements such as "X wastes Y hours per week." It was noted that those statements were departmental totals. CAO Pinsent provided specific feedback in an interview.
- Three members of the Finance Department noted that online tax bill look up would save them time. One of these respondents noted it would save 5 hours/week. This 5-hour assumption has been applied to the other two respondents. A fourth customer care clerk did not respond to the survey, but given their role, we assume that they also are receiving questions from residents on tax bill look-up. We assume this resource also spends 5 hours/week supporting residents with this function.
- One member of the Finance Department noted that they lose 2 hours/week searching for information that is not easily found. We assume that the four other staff below the director also spend this amount of time searching for information.
- The Infrastructure Administrative Assistant (part-time, assuming 20 hrs/week) noted that in the winter, they receive "calls all day" from residents asking about snow plow tracking. We assume 10% of their time is spent answering these calls for 46 days (average days of snowfall per year in Simcoe County).
- An Infrastructure Department employee noted that "a lot" of her time is spent searching for information. We assume 20% of their time.
- Only one bylaw enforcement officer responded to the survey, so we assume the other bylaw enforcement resources also spend the same amount of time on processes that could be improved and searching for information that could be better organized.
- One resource in the Planning Department stated time lost on processes that could be improved and searching for information that could be better organized. We assumed the same for the other Planning Department staff member.

Survey Overview: IT/IM Productivity Savings

Below is a summary of the IT and IM improvements, the number of respondents who noted this issue, the hours “lost” per week, weeks per year assumption, total hours “lost” per year, median hourly rate assumption, and total productivity dollars:

Responses	Activities	Hours/Week	Weeks/Year	Hours/Year	Median Hourly	Total
6	Online payments/digital invoicing	25.50	47	1198.50	35.39	\$ 42,414.92
6	Digital applications/maps	36.88	47	1733.13	35.39	\$ 61,335.29
6	OP/ZBL paper	21.25	47	998.75	35.39	\$ 35,345.76
18	Information searching ¹	54.63	47	2520.38	35.39	\$ 89,196.07
4	Viewing tax/utility bills online	20.00	47	940.00	35.39	\$ 33,266.60
2	Paper payroll	5.00	47	235.00	35.39	\$ 8,316.65
1	Standard incident reporting	2.00	47	94.00	35.39	\$ 3,326.66
1	Asset management	0.50	47	23.50	35.39	\$ 831.67
1	Road maintenance planning	8.00	47	376.00	35.39	\$ 13,306.64
2	Customer services	7.00	47	329.00	35.39	\$ 11,643.31
1	Council "to-do" tracking	4.00	47	188.00	35.39	\$ 6,653.32
4	Work order tracking (incl. bylaw)	18.50	47	869.50	35.39	\$ 30,771.61
1	Collaborative budgeting	4.00	47	188.00	35.39	\$ 6,653.32
1	Formatting documents	1.00	47	47.00	35.39	\$ 1,663.33
1	Public snow plow tracking	2.00	6.6	13.20	35.39	\$ 467.15
	Total					\$ 345,192.29

1. Based on the number of responses and hours lost per week, we assumed that, on average, staff lose 3 hours per week searching for information that could be better organized. Given that there were 29 staff members who hold in-office jobs (so excluding Infrastructure Labourers) provided to StrategyCorp, we have extrapolated this estimate to the whole corporation. When applied to 29 staff members, we estimated that approximately \$144,710 productivity dollars are lost each year due to searching for information. This number has been stated elsewhere in the report.

Survey Overview: Ramara's Use of Digital Tools (1/6)

Ramara's staff use the following digital tools. Items in green describe how the department currently uses the tool, and items in yellow describe opportunities for better utilizing this tool:

Tool	Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning	Assessment
 ACE				Explore opportunities to use ACE for fleet tracking	Record fleet use			The Infrastructure Department is satisfied with ACE for tracking fleet, and Fire and Rescue may be able to use ACE for its own fleet tracking.
 ADP	Digital timecard	Digital timecard	Managing payroll Digital timecard	Staff should input their time directly to ADP to reduce burden on administrative staff	Staff should input their time directly to ADP to reduce burden on administrative staff	Digital timecard	Digital timecard	ADP is a new timecard and payroll system, and more staff should be trained in entering time to cut down on paper processes and administrative assistant time.
 adtronics®		Ramara's signboard content should follow an updated communications policy				Managing Ramara Centre LED sign		Leg. and Comm. Services staff should continue to manage the signboard due to an inability to program it remotely, but content should follow a communications master plan.
 ArcGIS™	Reviewing property information for building applications	Viewing maps for resident and Council inquiries	Confirming tax roll number information for properties	Determining distances from halls/hydrants to fire calls for resident inquiries and Ontario Fire Marshall reporting	Asset management	Reviewing property information before conducting bylaw enforcement	Reviewing property information for planning applications	ArcGIS is a critical tool for the Township, and it should explore additional features such as modules for Citywide, field inspections, and Official Plan/zoning bylaw layers.
	Add inspections and Official Plan/zoning bylaw modules		Connections to CityWide can support improved asset management	Connections to CityWide can support improved asset management	Connections to CityWide can support improved asset management		Add inspections and Official Plan/zoning bylaw modules	

Survey Overview: Ramara's Use of Digital Tools (2/6)

Ramara's staff use the following digital tools. Items in green describe how the department currently uses the tool, and items in yellow describe opportunities for better utilizing this tool:

Tool	Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning	Assessment
		Ramara's TV content should follow an updated communications policy				Updating TV with communications in Town Hall This program should be added to additional computers to allow more access		This program should be added to more computers to allow more access, and content should follow a communications master plan.
			Tracking amortization and reconciling capital assets for year-end financial reports Connections to ArcGIS can support improved asset management	Fire and Rescue can use CityWide to support departmental asset management	Managing assets—maintenance activities, condition updates, replacement/transfer schedules Connections to ArcGIS can support improved asset management	Legislative and Community Service staff should be trained in CityWide for supporting the management of the community halls		CityWide is a new asset management software that all staff who maintain Township assets should be trained in.
				Manage emergency call data Manage training, personnel, and equipment				The Fire and Rescue Department is generally satisfied with this tool, but there are more functionalities that require training.
		Executive Services should be trained in using this system		Creating Township ID cards		Creating Township ID cards		More admin staff should be trained in this tool to be able to create more ID cards.
		Ramara's website Ramara's web content should follow an updated communications master plan						Ramara's new website should follow an updated communications master plan.

Survey Overview: Ramara's Use of Digital Tools (3/6)

Ramara's staff use the following digital tools. Items in green describe how the department currently uses the tool, and items in yellow describe opportunities for better utilizing this tool:

Tool	Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning	Assessment
		Ramara's Everbridge notifications should follow an updated communications master plan		Inform residents of emergencies Explore opportunities for using Everbridge for fire ban notifications or use website add-ons	Inform residents of notifications like road closures			Ramara uses this tool for mass notifications, primarily for emergencies. There may be opportunities to use this tool for more communications with residents or be replaced with website add-ons. All resident communication should follow a comms. master plan.
	All Ramara staff should have access to collaborative tools for list tracking, note taking, document sharing, etc.	All Ramara staff should have access to collaborative tools for list tracking, note taking, document sharing, etc.	All Ramara staff should have access to collaborative tools for list tracking, note taking, document sharing, etc.	All Ramara staff should have access to collaborative tools for list tracking, note taking, document sharing, etc.	Collaborative "to-do" list tracking and notetaking	All Ramara staff should have access to collaborative tools for list tracking, note taking, document sharing, etc.	All Ramara staff should have access to collaborative tools for list tracking, note taking, document sharing, etc.	Ramara should invest in a Township-wide tool for collaborative note taking, document sharing, etc.
					Video surveillance			Ramara uses this for video surveillance, and staff are satisfied with this tool.
				Dispatch back-up for emergency calls				Ramara requires a dispatch backup to Orillia dispatch, and staff are satisfied with FFRS.
						Database for short-term rentals in Ramara		This tool saves time for bylaw enforcement staff to monitor short-term rentals.

Survey Overview: Ramara’s Use of Digital Tools (4/6)

Ramara’s staff use the following digital tools. Items in green describe how the department currently uses the tool, and items in yellow describe opportunities for better utilizing this tool:

Tool	Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning	Assessment
	Staff should use HRdownloads training modules for Township training	Drafting HR policies Facilitating online training Developing job descriptions Receiving HR advice Use this tool for uploading training videos that all staff can access	Staff should use HRdownloads training modules for Township training	Staff should use HRdownloads training modules for Township training	Staff should use HRdownloads training modules for Township training	Explore opportunities for using HRdownloads for volunteer management Staff should use HRdownloads training modules for Township training	Staff should use HRdownloads training modules for Township training	HRdownloads provides HR support for Ramara. There are opportunities to utilize more functions and upload Ramara training videos for staff training.
	Drafting Council reports and agendas More training on functions	Drafting Council reports and agendas Following “to-dos” More training on functions	Drafting Council reports and agendas More training on functions	Drafting Council reports and agendas More training on functions	Drafting Council reports and agendas More training on functions	Drafting Council reports and agendas More training on functions	Drafting Council reports and agendas More training on functions	This is a new tool, and staff should be trained on this tool to support Council report and agenda development. Ramara also needs a better bylaw management system, and iCompass has a supporting module that could be explored.
 <p>Keystone</p>	Maintaining property information and application searches Manage building permits Conducting inspections with Keystone in Motion Manage departmental budgets	Resident information and corporate services support for other departments Manage departmental budgets	General ledger management, AP/AR, adjusting assessments, managing tax roll numbers, managing property tax accounts	Managing departmental budgets Conducting WETT inspections	Managing departmental budgets Managing property information	Maintaining property ownership information and dog licensing information Manage departmental budgets	Managing planning applications Manage departmental budgets	All departments use Keystone for information management on property information, resident information, permits, etc. More directors should use this tool for departmental budgeting.

Survey Overview: Ramara's Use of Digital Tools (5/6)

Ramara's staff use the following digital tools. Items in green describe how the department currently uses the tool, and items in yellow describe opportunities for better utilizing this tool:

Tool	Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning	Assessment
 Lucidpress		Creating media documents for publication				Creating communications materials		The Executive Services Department uses LucidPress for desktop publishing, and Legislative and Community Services seeks a desktop publishing tool.
 MaxGalaxy™						Ramara will need a new recreation programming software due to MaxGalaxy discontinuation		Ramara will need to invest in a new recreation programming management software. Recreation staff propose Perfect Mind.
 MetroCount® <small>Traffic Data Specialists</small>					Traffic data collection			Ramara needs to track traffic data, and MetroCount has limitations due to its hose.
					Ramara could explore updated traffic count software that does not rely on hoses			
 OSTicket	Staff desire an updated work order/complaint management system	Staff desire an updated work order/complaint management system	Managing resident queries/complaints Staff desire an updated work order/complaint management system	Staff desire an updated work order/complaint management system	Managing resident queries/complaints Staff desire an updated work order/complaint management system	Managing resident queries/complaints Staff desire an updated work order/complaint management system, particularly for bylaws	Staff desire an updated work order/complaint management system	Currently, Finance, Infrastructure, and Leg. and. Comm services use the OS Ticket system. However, staff who use it are not satisfied with it, and Ramara needs a new system for tracking work and resident complaints.

Survey Overview: Ramara's Use of Digital Tools (6/6)

Ramara's staff use the following digital tools. Items in green describe how the department currently uses the tool, and items in yellow describe opportunities for better utilizing this tool:

Tool	Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning	Assessment
					Managing fuel use in one of three depots Incorporate this technology to other two depots to optimize data collection			Infrastructure staff are satisfied with this tool and believe it could be better optimized if introduced to other fuel depots.
	Staff across departments desire a better digital file management system	Staff across departments desire a better digital file management system	Staff across departments desire a better digital file management system	Staff across departments desire a better digital file management system	Staff across departments desire a better digital file management system	Staff across departments desire a better digital file management system	Staff across departments desire a better digital file management system	Ramara needs to invest in a new digital file management system, as staff are not satisfied with SentryFile.
	Staff across Ramara could benefit from instant messaging platforms for communications	Staff across Ramara could benefit from instant messaging platforms for communications	Staff across Ramara could benefit from instant messaging platforms for communications	Staff across Ramara could benefit from instant messaging platforms for communications	Staff across Ramara could benefit from instant messaging platforms for communications	Informal intra-departmental communications	Staff across Ramara could benefit from instant messaging platforms for communications	Ramara should invest in an instant messaging platform for staff.
Streets in Cloud					Resident speed compliance Staff note that the hardware is often vandalized and expensive to replace			Ramara should explore new ways of ensuring resident speed compliance or methods for preventing vandalism to hardware.
						Creating file tabs for paper record management		The Records and Information Coordinator is satisfied with this tool.
	Hosting virtual meetings	Hosting virtual meetings	Hosting virtual meetings	All staff use this to host virtual meetings and want to use more virtual meetings.				

Survey Overview: Ramara's Managed Information

Tool	Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
 <p><i>Digitally-stored data/information</i></p>	Keystone: <ul style="list-style-type: none"> Applications Permits Inspections Notices Orders Complaints Septics 	<ul style="list-style-type: none"> Resident service complaints Media releases 	T: Drive <ul style="list-style-type: none"> Pre-authorized payment information Payroll remittance Tax sale files Keystone: <ul style="list-style-type: none"> Water bills Accounts payable Tax balances Property information Payment authorizations ADP <ul style="list-style-type: none"> Payroll 	T: Drive¹ <ul style="list-style-type: none"> Training/HR Asset management/equipment Health and safety Inspections Public education Budget management/Payroll Agreements Call reports Emergency planning CrySis <ul style="list-style-type: none"> Service calls Keystone <ul style="list-style-type: none"> Inspections 	T: Drive <ul style="list-style-type: none"> Fuel usage (also Phoenix) Equipment usage Work orders²/maintenance Budget management Inspections CityWide <ul style="list-style-type: none"> Asset management ADP <ul style="list-style-type: none"> General ledger OS Ticketing <ul style="list-style-type: none"> Resident complaints Evernote <ul style="list-style-type: none"> Notes Project management Budget management iCompass <ul style="list-style-type: none"> Council "to-dos" 	T: Drive <ul style="list-style-type: none"> Retention schedule FOI requests Website posts Bylaw complaints iCompass <ul style="list-style-type: none"> Council "to-dos" SentryFile <ul style="list-style-type: none"> Bylaws Staff reports MaxGalaxy <ul style="list-style-type: none"> Recreation registration, bookings, and payments Dog tag records GoogleDrive <ul style="list-style-type: none"> Programming planning OS Ticket <ul style="list-style-type: none"> Bylaw complaints Keystone <ul style="list-style-type: none"> Dog tag licences 	T: Drive <ul style="list-style-type: none"> Applications Planning documents Provincial planning documents Reports Keystone <ul style="list-style-type: none"> Applications Planning documents iCompass <ul style="list-style-type: none"> Reports
 <p><i>Paper-based data/information</i></p>	<ul style="list-style-type: none"> Plans (lack of scanning) Inspections Complaints Septics 	<ul style="list-style-type: none"> HR Onboarding HR Discipline HR Exiting Personnel Records Health and Safety Inspection reports Health and Safety Training Resident service complaints 	<ul style="list-style-type: none"> Water bills Accounts payable Property information Pre-authorized payment information Roll numbers (TOMRMS) Personnel files Payroll remittance Tax sale files Payment authorizations 	<ul style="list-style-type: none"> Training/HR Asset management/equipment Health and safety Inspections Public education Budget management/payroll Agreements 	<ul style="list-style-type: none"> Asset management Equipment usage Inspections Fuel usage Work orders² Road patrol tracking 	<ul style="list-style-type: none"> Bylaw complaints Dogs impounded at shelter Dog licences 	<ul style="list-style-type: none"> Applications Planning documents Provincial planning documents

1. The Fire and Rescue Department conducts all work first on paper and transfers paper data into Excel spreadsheets, which are saved on the T: Drive.
2. Work orders are printed out and given to staff. Once orders are completed, they are tracked in Excel. However, it appears that road maintenance is not tracked in the T: Drive

Survey Overview: Cross-Departmental Information

	Information Requested From:						
Department	Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
Building				<ul style="list-style-type: none"> • Fire inspections 	<ul style="list-style-type: none"> • Building Code Requirements 	<ul style="list-style-type: none"> • Bylaws • Council documents 	<ul style="list-style-type: none"> • Planning documents
Executive Services	<ul style="list-style-type: none"> • Health and safety documentation • Training documentation • HR documents 		<ul style="list-style-type: none"> • Training documentation • HR documents • Budgeting information 	<ul style="list-style-type: none"> • Training documentation • HR documents 	<ul style="list-style-type: none"> • Training documentation • HR documents 	<ul style="list-style-type: none"> • Training documentation • HR documents • Updated bylaws • Council documents • Bylaws 	<ul style="list-style-type: none"> • Training documentation • HR documents
Finance	<ul style="list-style-type: none"> • Property information 				<ul style="list-style-type: none"> • Asset management information 	<ul style="list-style-type: none"> • Bylaws • Council documents 	<ul style="list-style-type: none"> • Planning documents (e.g. severance details) • Property information
Fire and Rescue	<ul style="list-style-type: none"> • Property information • Site plan documents • New construction documents 		<ul style="list-style-type: none"> • Budgeting information (invoicing) 		<ul style="list-style-type: none"> • GIS mapping • Water flows and water availability 	<ul style="list-style-type: none"> • Bylaws • Council documents 	<ul style="list-style-type: none"> • Property information • Site plan documents • New construction documents
Infrastructure	<ul style="list-style-type: none"> • Permit applications/payments 		<ul style="list-style-type: none"> • Permit/payments • Budgeting information (invoicing) 			<ul style="list-style-type: none"> • Bylaws • Council documents 	<ul style="list-style-type: none"> • Permit applications/payments
Legislative and Community	<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs • Building permits (bylaw complaints) 	<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs 	<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs • Property information 	<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs 	<ul style="list-style-type: none"> • Updated bylaws • All files for TOMRMS • All files for FOIs 		<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs • Zoning bylaws
Planning	<ul style="list-style-type: none"> • Input on planning applications 			<ul style="list-style-type: none"> • Input on planning applications 	<ul style="list-style-type: none"> • Input on planning applications 		

Building Department (1/3)

Core Function and IT Vision

- **Core Function:** To manage property records and information for Ramara Township and to ensure that the minimum standards of the Ontario Building Code are met prior to and during building construction.
- **IT Vision:** To have fully digital data management and coordinate IT software use with Building, Planning, Bylaw, and Infrastructure to ensure robust, digital Township mapping and accessible information in the field.

Recommendations

1. Develop standardized and coordinated training policies—including super user training for multiple management staff—on digital tools and information sharing with the Building, Planning, Bylaw, and Infrastructure staff given their significant collaboration.
2. Invest in additional Keystone and ArcGIS capabilities, such as online permitting, digital mark-ups, and Official Plan and zoning layering.
3. Invest in online payment options for permits.
4. Conduct Township-wide trainings on Zoom and iCompass so all staff understand advanced capabilities.

Current IT Uses

Operation/Process	Supporting Technology	Function
Maintain property records	 	<p>Keystone stores property information including assessment and MPAC data, but staff desire more advanced options.</p> <p>ArcGIS is the County's GIS system that stores property status information with layers such as flooding, servicing, etc. It is used to review existing structures and features when reviewing building and planning applications. Staff desire more features from this software, including Township Official Plan and zoning layers.</p>
Provide building permits		Keystone is used to store applications, but staff desire the online application options through Keystone.
Conduct building inspections		Keystone in Motion stores inspection information.
Draft Council reports, agendas		iCompass provides templates for Council reports, agendas, etc. for the whole Township. It is primarily used by directors, and staff below the director level are not typically trained on it.
Access records for bylaws, permits, agreements, etc.		SentryFile manages information, but staff in the Building Department do not use this tool because it is outdated and not user friendly.
Facilitate department meetings		Zoom provides a virtual platform for meetings.

Building Department (2/3)

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Potential Time Saved	Yearly Productivity Savings Potential
Online payments for permit, site plan, and security deposits	Staff currently spend significant time following up with applicants who have not paid fees upfront. 20% of staff time is lost due to this process.	22.5 hours/week	\$37,424.93
Marking up plans	Staff could use digital tools to mark up plans online, reducing the need to discuss over email and phone. Storing these mark-ups digitally would allow for clearer understanding of code review among staff, reducing the potential for misunderstanding. 15% of staff time is lost due to this process. ✓ Keystone offers this digital solution.	16.88 hours/week	\$34,040.76
Township Official Plan and zoning bylaw layering to digital mapping	Staff currently use paper copies for Official Plan and zoning bylaws. Digital Township Official Plan and zoning mapping in Arc GIS would reduce time staff spend searching through hard copies of documents. Furthermore, it would allow automatic search of applicable zoning requirements, which would allow for quicker response times for residents. 10% of staff time is lost due to this process. ✓ Arc GIS offers this digital solution.	11.25 hours/week	\$18,712.46
Permitting process	Staff desire online application options to streamline the permitting process. ✓ Keystone offers this digital solution.		
Virtual meetings through Zoom	Advanced Zoom training for staff so that they can share more documents and information through the app during calls.		
Council reports and agenda development	Advanced iCompass training for staff so that staff have a shared understanding of formatting and iCompass' advanced capabilities.		
Total "Light Green" Savings Potential		50.63 hours/week	\$90,178.15

Building Department (3/3)

Information Management

Paper-Managed Information	Digitally-Managed Information
<ul style="list-style-type: none"> Plans (lack of scanning) Inspections Complaints Septics 	<p>Keystone:</p> <ul style="list-style-type: none"> Applications Permits Inspections Notices Orders Complaints Septics

Staff Time Lost due to Lack of Information Sharing
<p>Staff did not indicate how much time is lost due to searching for information.</p>

Cross-Departmental Information

Information Requested From:						
Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
			<ul style="list-style-type: none"> Fire inspections 	<ul style="list-style-type: none"> Building Code Requirements 	<ul style="list-style-type: none"> Bylaws Council documents 	<ul style="list-style-type: none"> Planning documents

Executive Services Department (1/3)

Core Function and IT Vision

- **Core Function:** To support the Chief Administrative Officer with corporate services functions such as human resources, communications, strategic initiatives, and Council liaising.
- **IT Vision:** To use digital tools to provide Council, staff, and residents information that is timely, consistent, accurate, and informative and to provide staff access to training in a digital format for continuous improvement and development.

Recommendations

1. Develop communications master plan for the website, social media, and media relations.
2. Develop a staff training schedule policy and incorporate staff training and development into the yearly performance management framework.

Current IT Uses

Operation/Process	Supporting Technology	Function
Provide standard human resources functions	 HRdownloads®	HRdownloads provides human resources policy development support, stores Ramara's human resources policies, provides modules for online employee training, provides recruitment support through job description generators, and provides human resources advice. Executives Services staff believe more staff outside their department could better optimize this tool.
Manage Ramara's website	 eSolutionsGroup	Ramara uses eSolutionsGroup for website design and management. This is a new website that launched in early August.
Create and manage Township communications	 Lucidpress	Staff use LucidPress to create media documents for publication, social media, etc.
Draft Council reports, agendas	 iCompass	iCompass provides templates for Council reports, agendas, etc. for the whole Township.
Support resident information management	 Keystone ArcGIS	Keystone holds resident information. Executive Services uses this for Council correspondence and other resident engagement. Executive Services uses ArcGIS to respond to resident/Council inquiries.
Corporate services support for other departments	 Keystone	Many departments use Keystone to manage information, and the application is accessible to staff across Ramara. More training on how other departments use this tool can reduce the need to ask staff for information.
Access records for bylaws, permits, agreements, etc.	 SENTRYFILE Document Management	SentryFile manages information, but staff in the Executive Services Department believe this information management system is cumbersome and should be replaced.
Facilitate department meetings	 zoom	Zoom provides a virtual platform for meetings.

Executive Services Department (2/3)

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Productivity Enhancement Potential	Yearly Productivity Savings Potential
Collaboration/information sharing	The CAO noted that 20% of his time is lost due to a lack of collaboration tools (e.g. collaborative documents, information sharing, etc.).	7.5 hours/week	\$12,474.98
Staff training and training schedule policy	HRdownloads provides online training modules and has the ability to upload recorded, Ramara-specific trainings for later viewing. Ramara should invest in recording capabilities, use the upload feature more, and consistently communicate the training opportunities that are available in HRdownloads. Ramara should also develop a training schedule policy that links training participation to employee performance management.	-	-
Communications master plan for website, social media, and media relations	While Ramara has digital tools to support communication, but it lacks a consistent communications master plan for its website, social media, and media engagement. These policies should outline who develops the communications, who approves the communications, timelines for communications approvals, etc.		
Bylaw, agenda, and minute management	Given the Executive Services Department's role in liaising with Council and supporting the CAO in administration, it needs to be able to search for bylaws and archived agendas and minutes. This is a common improvement opportunity across the Township. ✓ iCompass can store and manage bylaws and archived agendas and minutes	-	-
Human resources	Though Ramara's HR policies are stored in HRdownloads, all HR forms are paper-based, and there is currently no option for digitizing this process.		
Total "Light Green" Savings Potential		7.5 hours/week	\$12,474.98

Executive Services Department (3/3)

Information Management

Paper-Managed Information	Digitally-Managed Information
<ul style="list-style-type: none"> • HR Onboarding • HR Discipline • HR Exiting • Personnel Records • Health and Safety Inspection reports • Health and Safety Training • Resident service complaints 	<ul style="list-style-type: none"> • Resident service complaints • Media releases

Staff Time Lost due to Lack of Information Sharing

Staff collectively spend 12.5 hours/week searching for information that is not easily found. This equates to approximately \$20,791.64 light green dollars per year.

Cross-Departmental Information

Information Requested From:						
Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
<ul style="list-style-type: none"> • Health and safety inspections • Training documentation • HR documents 		<ul style="list-style-type: none"> • Training documentation • HR documents • Budgeting information 	<ul style="list-style-type: none"> • Training documentation • HR documents 	<ul style="list-style-type: none"> • Training documentation • HR documents 	<ul style="list-style-type: none"> • Training documentation • HR documents • Updated bylaws • Council documents • Bylaws 	<ul style="list-style-type: none"> • Training documentation • HR documents

Finance Department (1/3)

Core Function and IT Vision

- **Core Function:** To manage all municipal finances, including general ledger; accounts payable/accounts receivable; tax and utility lookup for residents; tax collection; etc.
- **IT Vision:** To provide completely paperless financial services.

Recommendations

1. Invest in digital invoicing capabilities.
2. Invest in digital vendor payment capabilities.
3. Invest in digital tax and utility bill look up.
4. Explore iCompass capabilities for bylaw management.

Current IT Uses

Operation/Process	Supporting Technology	Function
Manage municipal financial transactions	 	<p>Keystone provides a myriad of municipal financial management functions. Ramara uses Keystone to support general ledger management, AP/AR, adjusting assessments, managing tax roll numbers, managing property tax accounts. Financial staff could not do their jobs without this software.</p> <p>Some Finance Department staff use ArcGIS to confirm roll number information.</p>
Manage capital expenses		<p>The Treasurer uses Citywide to track amortization and to reconcile capital assets for year-end financial reports. Other staff in the Finance Department do not use this tool.</p>
Draft Council reports, agendas		<p>iCompass provides templates for Council reports, agendas, etc. for the whole Township. It is primarily used by directors, and staff below the director level are not typically trained on it.</p>
Manage resident inquiries/complaints		<p>Ramara maintains an online system for tracking resident complaints. However, Ramara currently uses a free version with limited capabilities, and staff do not use it consistently.</p>
Access records for bylaws, permits, agreements, etc.		<p>SentryFile manages information, but staff in the Finance Department do not use this tool because it is outdated.</p>
Manage payroll		<p>ADP provides digital timecards for all staff and maintains payroll and remittance information. This is a new tool, but the Finance staff are satisfied with its performance thus far.</p>
Facilitate department meetings		<p>Zoom provides a virtual platform for meetings.</p>

Finance Department (2/3)

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Productivity Enhancement Potential	Yearly Productivity Savings Potential
Tax and utility bill look up	Residents often request help from the Finance staff for information on their taxes, utility payments, etc. This will not only save staff time, but it also provides a more streamlined service for residents. ✓ Keystone provides this digital solution.	20 hours/week	\$33,266.60
Invoicing	Ramara could transition to a fully digital invoice approval, payment, and storage process. This would allow for easier lookup of invoices, less time scanning from AP clerk, and less storage in the file room.	2 hours/week	\$3,326.66
Vendor payments	Vendor accounts could have electronic funds transfer capabilities. This would save staff time organizing cheque stubs and invoicing, and it would save materials (paper, stamps) costs. ✓ Keystone provides this digital solution.		
Bylaw look-up	The Finance Department frequently refers to bylaws. Staff across the Township have noted the need for an improved online bylaw portal. ✓ iCompass can store and manage bylaws and archived agendas and minutes.		
Total "Light Green" Savings Potential		22 hours/week	\$36,593.26

Finance Department (3/3)

Information Management

Paper-Managed Information	Digitally-Managed Information
<ul style="list-style-type: none"> • Water bills • Accounts payable • Property information • Pre-authorized payment information • Roll numbers (TOMRMS) • Personnel files • Payroll remittance • Tax sale files • Payment authorizations 	<p>T: Drive:</p> <ul style="list-style-type: none"> • Pre-authorized payment information • Payroll remittance • Tax sale files <p>Keystone:</p> <ul style="list-style-type: none"> • Water bills • Accounts payable • Tax balances • Property information • Payment authorizations <p>ADP</p> <ul style="list-style-type: none"> • Payroll

Staff Time Lost due to Lack of Information Sharing
<p>Staff collectively spend 15 hours/week searching for information that is not easily found. This equates to approximately \$24,949.95 light green dollars per year.</p>

Cross-Departmental Information

Information Requested From:						
Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
<ul style="list-style-type: none"> • Property information 				<ul style="list-style-type: none"> • Asset management information 	<ul style="list-style-type: none"> • Bylaws • Council documents 	<ul style="list-style-type: none"> • Planning documents (e.g. severance details) • Property information

Fire and Rescue Department (1/4)

Core Function and IT Vision

- **Core Function:** To provide Ramara residents fast and effective emergency management and response, including motor vehicle collisions, structure fires, grass fires, ambulance assists, burning complaints, water rescue, ice rescue, and alarm calls.
- **IT Vision:** To use digital tools effectively to minimize procedural work, allowing firefighters to focus on emergency response.

Recommendations

1. Invest in tablets and digitize incident reporting software.
2. Invest in digital records management software for maintaining records on training, inspections, health and safety meetings, and gear cleaning/asset management.
3. Conduct training on ADP use for timecards.
4. Invest in digital invoicing capabilities.
5. Explore using Everbridge or website add-ons for communication fire bans.

Current IT Uses

Operation/Process	Supporting Technology	Function
Draft Council reports, agendas	 iCompass	iCompass provides templates for Council reports, agendas, etc. for the whole Township. It is primarily used by directors, and staff below the director level are not typically trained on it.
Manage departmental budgets		Fire and Rescue Department staff use Keystone to look up invoices and vendors and generate reports on current spend against budget.
Conduct WETT inspections		Fire and Rescue Department staff use Keystone for address lookups for WETT inspections. However, a standardized policy for inputting information is needed to improve the search function.
Create accountability tags	 Entrust Datacard®	Data Card allows Ramara staff to create badges and accountability tags. The Fire and Rescue Department uses this tool frequently, and more staff across Ramara should be trained on it so that more people can program employee key cards.
Manage emergency call data	 CriSys	Ramara shared the CriSys software with six other municipalities, and it is managed through Orillia Dispatch. It streamlines Ramara's reporting requirements for the province and keeps legally required documentation of all calls. More training on this program could allow the department to pull more reports independently.
Access records for bylaws, property files, and fire-related files	 SENTRY FILE Document Management	The Fire and Rescue Department stores property files and other fire related files with Sentry File and uses it to look up past bylaws. Staff note that Sentry File is more accurate than the T-Drive.
Inform residents of emergencies	 everbridge®	Ramara uses this technology for mass notifications. The Fire and Rescue Department uses it for emergency notices, but other departments also use it and require the fire administrative assistant's support. More training is needed across the Township.

Fire and Rescue Department (2/4)

Current IT Uses

Operation/Process	Supporting Technology	Function
Assess distance from fire halls/hydrants to calls	 ArcGIS	The Fire and Rescue Department currently uses this technology to determine distances from halls/hydrants to fire calls for resident inquiries and Ontario Fire Marshall reporting. Ramara staff want the ability to add their own layers to this tool.
Dispatch for fire calls	 FFRS	Ramara uses FFRS as a redundancy for Orillia Dispatch. It offers visual follow-ups and consistent messaging and is more effective than email when sending mass notifications to Ramara's fire fighters.
Facilitate department meetings	 zoom	Zoom provides a virtual platform for meetings.

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Productivity Enhancement Potential	Productivity Savings Potential
Standard incident reporting	<p>Call sheets are manually filled out and then collected from the halls and inputted into a digital format for provincial reporting. The Fire and Rescue Department could digitize this process with tablets and digital forms that allow for written information, photos, videos, GIS information, and audio capturing at the scene.</p> <p>✓ FireHouse provides this digital tool, and Ramara should explore if CriSys also offers field reporting capabilities</p>	2 hours/week	\$3,326.66
Maintaining records on training, inspections, health and safety meetings, and gear cleaning/asset management	<p>This information is currently being tracked using paper forms and Excel. For example, training documentation is tracked on two different hard copies, sent to the administrative assistant who inputs it into an Excel spreadsheet, and then transfers it to ADP for payroll. There is no documentation system that allows the department to easy search for past records.</p> <p>A digital asset management tool could be helpful to schedule replacements, track lifecycles, and set reminders for gear inspections. CriSys has these functionalities.</p>	0.5 hours/week	\$831.67
Payroll	<p>The current payroll system for Fire and Rescue relies on paper forms and Excel, which is then transferred to ADP.</p> <p>✓ Rescue and Fire should fully migrate to ADP.</p>	2 hours/week	\$3,326.66

Fire and Rescue Department (3/4)

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Productivity Enhancement Potential	Yearly Productivity Savings Potential
Invoicing from incident reports	The invoicing system relies on information collected on paper on the scene and often misses information. If the fire reports were electronic, they could include sections related to invoicing, and more revenue could be collected for the fire department.	0.5 hours/week	\$831.67
Budget management	The department currently uses Excel to manage its budget. Ramara is currently working to establish a more collaborative budgeting process, and it should train all directors and managers on a common, digital budgeting tool.		
Fire ban communications	Ramara should introduce a burn permit system as an additional source of revenue and should use an online system to communicate immediately and directly with the Township in the case of a ban.		
Total "Light Green" Savings Potential		5 hours/week	\$8,316.65

Fire and Rescue Department (4/4)

Information Management

Paper-Managed Information	Digitally-Managed Information
<ul style="list-style-type: none"> • Training/HR • Asset management/equipment • Health and safety • Inspections • Public education • Budget management/payroll • Agreements 	<p>T: Drive¹</p> <ul style="list-style-type: none"> • Training/HR • Asset management/equipment • Health and safety • Inspections • Public education • Budget management/Payroll • Agreements • Call reports • Emergency planning <p>CrySis</p> <ul style="list-style-type: none"> • Service calls <p>Keystone</p> <ul style="list-style-type: none"> • Inspections

Staff Time Lost due to Lack of Information Sharing
Staff did not indicate how much time is lost due to searching for information.

Cross-Departmental Information

Information Requested From:						
Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
<ul style="list-style-type: none"> • Property information • Site plan documents • New construction documents 		<ul style="list-style-type: none"> • Budgeting information (invoicing) 		<ul style="list-style-type: none"> • GIS mapping • Water flows and water availability 	<ul style="list-style-type: none"> • Bylaws • Council documents 	<ul style="list-style-type: none"> • Property information • Site plan documents • New construction documents

1. The Fire and Rescue Department conducts all work first on paper and transfers paper data into Excel spreadsheets, which are saved on the T: Drive.

Infrastructure Department (1/4)

Core Function and IT Vision

- **Core Function:** To manage the entirety of Ramara's public assets, including transportation, recreation, and environmental assets, and ensure they are safe for resident use.
- **IT Vision:** To collect and maintain fully digital data on assets and public works projects using programs that are seamless between the Building, Planning, Bylaw Enforcement, and Infrastructure Departments.

Recommendations

1. Invest in digital tools for road maintenance planning.
2. Invest in an updated work order tracking system.
3. Utilize more functions in iCompass to support Council relations/approvals.
4. Train staff on using ADP for timecards.
5. Standardize and lock templates.
6. Invest in online payment options for permits.
7. Explore options in ACE for making snow plow tracking public.
8. Invest in Citywide module for ArcGIS.

Current IT Uses

Operation/Process	Supporting Technology	Function
Draft Council reports, agendas		iCompass provides templates for Council reports, agendas, etc. for the whole Township. It is primarily used by directors, and staff below the director level are not typically trained on it.
Manage departmental budgets		The Director of Infrastructure uses Keystone to look up invoices and general ledger information, generate reports on current spend against budget, and other budget management processes. However, more training on Keystone's potential is needed.
Manage property information		The department uses Keystone to manage and search property information, and file permit documentation.
Asset management	 	<p>Citywide is a new tool, and department staff use it to update, verify, change, fix, and manage the assets. They plan to use it for maintenance activities to establish life cycle activities, to update the condition of the assets, and to replace/transfer assets. More staff will need to be trained on this tool to ensure it is used most effectively and efficiently.</p> <p>Several additional modules in Citywide have not been purchased but could be explored, including road patrol component, workorder component, and complaint tracking component.</p> <p>The Township uses ArcGIS for all GIS functions for asset management, including creating maps, viewing property information, responding to resident inquiries, etc. Other Ramara staff can view maps using the webmap version. The Township is in the early stages of linking Citywide to ArcGIS and should continue this migration. Other functions, such as adding data on septic re-inspection, short-term rental information, and fire inspections could be explored.</p>

Infrastructure Department (2/4)

Current IT Uses

Operation/Process	Supporting Technology	Function
Inform residents of emergencies/road closures		Ramara uses this technology for mass notifications. The Infrastructure Department uses it for road closures, but they want to expand its use to water shut-downs as well. Though it is an expensive tool, the Township needs to have a mass notification system in place.
Record fleet use		Ramara uses this system to check fleet use, such as snow plowing, check fleet speed in response to complaints, and check for unauthorized use. There may be opportunities to use this technology in other departments, such as Fire and Rescue.
Manage resident inquiries/complaints		Ramara maintains an online system for tracking resident complaints, which is an important function within the Infrastructure Department. However, this program is not web-based, so it cannot be updated in the field; it is not integrated with other programs like Citywide; and it is not consistently used across the Township.
Manage fuel use		Ramara uses this fuel-tracking device. It controls access to fuel and tracks fuel usage. It is not currently being used to its full potential because it only functions in one of the three fuel depots, it is not compatible with all Township computers, and it is not user friendly. It is a helpful tool, but more training is required to be able to use it to its full potential.
Collaborative “to-do” list tracking and notetaking		Some staff in the Infrastructure Department use Evernote to collaboratively track daily notes, create shared “to-do” lists, and update on project progress. It allows departmental notes to be stored in a central repository that is searchable and shareable. However, not all staff in this department use it.
Access records for bylaws, permits, agreements, etc.		SentryFile manages information, but staff in the Infrastructure Department—other than the administrative assistant—do not use this tool because it is outdated.
Video surveillance		The Director of Infrastructure uses this video surveillance technology for property management.
Traffic collection		Ramara uses this technology for traffic collection; however, because it is a hose-based system, it cannot be used in the fall, winter, and spring due to plows and graders.
Resident speed compliance	Street on Cloud	Ramara uses speed monitor signs to encourage resident compliance with speed limits, and it also collects traffic count data. However, residents steal or vandalize the technology, and it is expensive to replace.
Facilitate department meetings		Zoom provides a virtual platform for meetings.

Infrastructure Department (3/4)

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Productivity Enhancement Potential	Yearly Productivity Savings Potential
Road maintenance planning	The Infrastructure Department needs a digital software and electronic tablets with sufficient battery life (or back-up batteries) so that they can collaboratively document road conditions, maintain work orders, issues purchase orders and invoices, track vehicle use, manage budgets, etc. Currently, the department uses a mix of paper processes, tablets (with insufficient battery life), and Excel to track work.	8 hours/week	\$13,306.64
Tracking resident complaints/inquiries	Residents should be able to submit a complaint or inquiry directly into a tracking system. The new website has a complaint feature, but it is sent as an email to staff and does not have a tracking feature, nor can it communicate to residents.	7 hours/week	\$11,643.31
Council relations/approvals	iCompass should be better utilized to track Council resolutions and assign staff work.	4 hours/week	\$6,653.32
Budget management	Infrastructure staff also desire more collaborative budgeting tools to create efficiencies. Time is lost using multiple systems, and approvals are sometimes missed.	4 hours/week	\$6,653.32
Payroll	Staff need to be trained on inputting time into ADP directly. Currently, staff fill out information on paper, and the administrative assistant inputs it into ADP.	3 hours/week	\$4,989.99
Documentation	Document formatting must be in Arial 12; however this is not the default in Microsoft Word. The Township needs templated documents with control to prevent formatting from reverting back to default setting to save time on formatting.	1 hour/week	\$1,663.33
Permitting and payment process	Residents can submit electronic applications via email; however, they cannot pay at the same time they submit the application. Incorporating online payment with the application would reduce several steps for securing payment.	0.5 hours/week	\$831.67
Work order tracking	Work orders are currently given via paper and then tracked in Excel. A new work order system should support this function electronically.	0.5 hours/week	\$831.67
Snow plow tracking	A software that allows residents to view snow plow tracking would save time for staff who spend significant time responding to resident complaints.	13 hours/year	\$467.15
Asset management	As stated, connecting Citywide to the ArcMap and purchasing Esri apps for inspections could facilitate more robust asset management and could locate water requests, which are currently stored on the T-Drive.		
Total "Light Green" Savings Potential		28 hours/week	\$47,040.40

Infrastructure Department (4/4)

Information Management

Paper-Managed Information	Digitally-Managed Information
<ul style="list-style-type: none"> Asset management Equipment usage Inspections Fuel usage Work orders¹ Road patrol tracking 	<p>T: Drive</p> <ul style="list-style-type: none"> Fuel usage (also Phoenix) Equipment usage Work orders¹ /maintenance Budget management Inspections <p>CityWide</p> <ul style="list-style-type: none"> Asset management <p>ADP</p> <ul style="list-style-type: none"> General ledger <p>OS Ticketing</p> <ul style="list-style-type: none"> Resident complaints <p>Evernote</p> <ul style="list-style-type: none"> Notes Project management Budget management <p>iCompass</p> <ul style="list-style-type: none"> Council “to-dos”

Staff Time Lost due to Lack of Information Sharing

Staff collectively spend 16.9 hours/week searching for information that is not easily found. This equates to approximately \$28,068.70 light green dollars per year.

Cross-Departmental Information

Information Requested From:						
Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
<ul style="list-style-type: none"> Permit applications/ payments 		<ul style="list-style-type: none"> Permit/payments Budgeting information (invoicing) 			<ul style="list-style-type: none"> Bylaws Council documents 	<ul style="list-style-type: none"> Permit applications/payments

1. Work orders are printed out and given to staff. Once orders are completed, they are tracked in Excel. However, it appears that road maintenance is not tracked in the T: Drive.

Legislative and Community Services Department (1/4)

Core Function and IT Vision

- **Core Function:** To provide the necessary administrative supports for ensuring democratic processes, such as Council and Committee support, elections, bylaw development and enforcement, and records management and to provide community recreation programming and liaise with community boards.
- **IT Vision:** To replace paper processes with digital tools for bylaw enforcement and to provide community services (recreation program development and registration, Council livestreaming, etc.) through digital means.

Recommendations

1. Invest in an updated bylaw complaint tracking system.
2. Replace MaxGalaxy with a new recreation program.
3. Train staff in LucidPress while a communications master plan is developed.
4. Invest in a digital volunteer management system, potentially using Hrdownloads.
5. Invest in a new EDRMS system.
6. Invest in a Township-wide internal instant messaging tool.

Current IT Uses

Operation/Process	Supporting Technology	Function
Draft Council reports, agendas	 iCompass	iCompass provides templates for Council reports, agendas, etc. for the whole Township. It is primarily used by directors, and staff below the director level are not typically trained on it.
Manage resident inquiries/complaints	 OSTicket	Ramara maintains an online system for tracking resident complaints. However, staff across the Township complain of its limitations. It is not accessible in the field, and all staff have access to all complaints. Bylaw enforcement staff in particular desire a new system.
Departmental communications	 slack	Staff in the recreation department use Slack to send instant messages. Not all staff in the Legislative and Community Service Departments are aware of this technology.
Recreation program registration and management	 MaxGalaxy™	The recreation staff use this program for recreation programming registration and dog tag licensing. However, the program's parent company is unable to continue to the program, and the Township is currently exploring new software options.
Management of LED signboard outside Ramara Centre	 adtronics®	Ramara uses Adtronics' Pluto Manager for managing its LED signboard outside the Ramara Centre. Staff must be at the Ramara Centre to update the sign. It is unable to be updated remotely.
Management of TV display in Town Hall	 BrightSign®	Ramara uses BrightSign to manage the TV display in the Town Hall foyer. The software is only loaded onto the Council Chambers laptop, limiting staff ability to update the display.
Employee ID	 Entrust Datacard®	Legislative and Community Services staff use Entrust Datacard to create employee ID cards.

Legislative and Community Services Department (2/4)

Current IT Uses

Operation/Process	Supporting Technology	Function
Manage records for bylaws, permits, agreements, etc.		The Records and Information Coordinator primarily manages Sentry File, updates it consistently, and knows how to use it, but other staff in this department and across the Township do not find it to be user friendly and accessible.
Maintain property ownership information and dog licensing information		Legislative and Community Services Department can look up residents' property information or dog licensing information. However, it is not user friendly for dog licenses.
Bylaw enforcement		Bylaw enforcement staff use ArcGIS to look up addresses and understand properties before conducting bylaw enforcement.
Paper file management		The Records and Information Coordinator is the only staff person with access to this software. It allows them to make uniform file labels. However, Ramara no longer pays for tech support for TABQuik and so there may be opportunities to use the web-based version.
Ensuring short-term rental compliance		Bylaw enforcement staff use Host Compliance for finding unlicensed short-term rentals.
Facilitate department meetings		Zoom provides a virtual platform for meetings.

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Productivity Enhancement Potential	Productivity Savings Potential
Bylaw complaint management	<p>Bylaw enforcement staff desire an improved bylaw enforcement tracking system that includes the complaint and associated address, property owner information, photos etc. Additionally, a system that is synced to other departments so that updates to property information are shared across departments.</p> <p>Currently, bylaw enforcement officers have to upload everything manually in the OS ticket system. When officers complete their shift, they have to verbally explain to the next officer the work they performed on their shift. A system that can allow officers to report work in real-time and can share with other officers is needed.</p>	18 hours/week	\$29,939.94

Legislative and Community Services Department (3/4)

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Productivity Enhancement Potential	Yearly Productivity Savings Potential
Visitor management	COVID-19 guidelines will require that visitors to the Ramara Centre sign in electronically.		
Recreation program registration and management	Because MaxGalaxy is discontinuing its software, Ramara will need a replacement software and is currently reviewing Perfect Mind as a replacement.		
Informal staff communications	The recreation staff currently use Slack for information conversations, but a staff intranet that stores information and has an internal chat feature can allow more collaboration in and across departments.		
Create and manage resident-facing communications	Recreation staff want an online desktop publishing tool for communications. <ul style="list-style-type: none"> ✓ The Executive Services Department currently uses Lucid Press, and this option should be explored further for other departments or replaced with a tool that all departments can use. 		
Volunteer management	The recreation department desires a digital tool for managing volunteers and sharing information with them. <ul style="list-style-type: none"> ✓ HRdownloads could be explored as a potential option for this technology need. 		
Records management	Ramara needs an updated Electronic Document Records Management System (EDRMS) to replace current software like Sentry File. A new system will enable better compliance with legislation and streamline FOI requests for digital files.		
Total "Light Green" Savings Potential		18 hours/week	\$29,939.94

Legislative and Community Services Department (4/4)

Information Management

Paper-Managed Information	Digitally-Managed Information
<ul style="list-style-type: none"> • Bylaw complaints • Dogs impounded at shelter • Dog licenses 	<p>T: Drive</p> <ul style="list-style-type: none"> • Retention schedule • FOI requests • Website posts • Bylaw complaints <p>iCompass</p> <ul style="list-style-type: none"> • Council “to-dos” <p>SentryFile</p> <ul style="list-style-type: none"> • Bylaws • Staff reports <p>MaxGalaxy</p> <ul style="list-style-type: none"> • Recreation registration, bookings, and payments • Dog tag records <p>GoogleDrive</p> <ul style="list-style-type: none"> • Programming planning <p>OS Ticket</p> <ul style="list-style-type: none"> • Bylaw complaints <p>Keystone</p> <ul style="list-style-type: none"> • Dog tag licences

Staff Time Lost due to Lack of Information Sharing

Staff collectively spend 8.25 hours/week searching for information that is not easily found. This equates to approximately \$13,722.47 light green dollars per year.

Cross-Departmental Information

Information Requested From:						
Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs • Building permits (bylaw complaints) 	<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs 	<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs • Property information 	<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs 	<ul style="list-style-type: none"> • Updated bylaws • All files for TOMRMS • All files for FOIs 		<ul style="list-style-type: none"> • All files for TOMRMS • All files for FOIs • Zoning bylaws

Planning Department (1/3)

Core Function and IT Vision

- **Core Function:** To facilitate growth and development in Ramara Township according to the Township’s Official Plan and zoning bylaws.
- **IT Vision:** To have fully digital data management and coordinate IT software use with Building, Planning, Bylaw, and Infrastructure to ensure robust, digital Township mapping and accessible information in the field.

Recommendations

1. Invest in online permitting processes.
2. Invest in digitization of Township Official Plan and zoning bylaws into ArcGIS.
3. Invest in needed scanners for digitizing hard copies of files and survey (in addition to investing in an online permitting process).

Current IT Uses

Operation/Process	Supporting Technology	Function
Manage planning applications	 	Keystone stores property information for planning applications, building permits, and previous planning applications. ArcGIS is the County’s GIS system that stores property status information with layers such as flooding, servicing, etc. It is used to review existing structures and features when reviewing building and planning applications. Staff desire more features from this software, including Township Official Plan and zoning layers.
Access records for bylaws, permits, agreements, etc.		SentryFile manages information, but staff in the Planning Department do not use this tool because it is outdated and not user friendly.
Draft Council reports, agendas		iCompass provides templates for Council reports, agendas, etc. for the whole Township. It is primarily used by directors, and staff below the director level are not typically trained on it.
Facilitate internal and external meetings		Zoom provides a virtual platform for meetings. Staff in the Planning Department are interested in using Zoom for pre-consultations with out of town residents and developers.

Planning Department (2/3)

Information Technology Needs and Improvement Opportunities

Operation/Process	Digital Process Improvements	Productivity Enhancement Potential	Yearly Productivity Savings Potential
Managing the permitting process	Prior to COVID-19, planning applications could only be submitting in hard copy. Staff would have to scan applications to digitize them, and there was no central storage for managing applications through their lifecycle. During COVID-19, staff are accepting application via email, but there is no way to accurately track the applications.	20 hours/week	\$33,266.60
Managing planning applications	Staff currently use paper copies for Official Plan and zoning bylaws. Digital Township Official Plan and zoning mapping in Arc GIS would reduce time staff spend searching through hard copies of documents. Furthermore, it would allow automatic search of applicable zoning requirements, which would allow for quicker response times for residents. Also, Ramara does not currently have the ability to digitize hard copies of drawing files or surveys. Residents and external agencies have to take photos of oversized drawings at a very low quality. ✓ Arc GIS offers this digital solution.	10 hours/week	\$16,633.30
Total "Light Green" Savings Potential		30 hours/week	\$49,899.90

Planning Department (3/3)

Information Management

Paper-Managed Information	Digitally-Managed Information
<ul style="list-style-type: none"> • Applications • Planning documents • Provincial planning documents 	<p>T: Drive</p> <ul style="list-style-type: none"> • Applications • Planning documents • Provincial planning documents • Reports <p>Keystone</p> <ul style="list-style-type: none"> • Applications • Planning documents <p>iCompass</p> <ul style="list-style-type: none"> • Reports

Staff Time Lost due to Lack of Information Sharing

Staff collectively spend 2 hours/week searching for information that is not easily found. This equates to approximately \$3,326.66 light green dollars per year.

Cross-Departmental Information

Information Requested From:						
Building	Executive Services	Finance	Fire and Rescue	Infrastructure	Legislative and Community Services	Planning
<ul style="list-style-type: none"> • Input on planning applications 			<ul style="list-style-type: none"> • Input on planning applications 	<ul style="list-style-type: none"> • Input on planning applications 		



Appendix B: Current State Report

Current State Assessment: Overview

Project Context

The Township of Ramara engaged StrategyCorp to conduct a service delivery review in order to assess and identify improvement opportunities across the services offered to residents and its internal operations with a focus on infrastructure services and information management. The objectives of this review are to (1) identify services and service levels that best meet legislative and community need; (2) improve service delivery through various means; (3) identify improved information management processes; and (4) identify options to reduce operating costs while maintaining appropriate staffing levels.

Phase 2: Current State Assessment

This Current State Report details the results of Phase 2 of this engagement, which represent the Current State Assessment. Key objectives for the phase include:

- Building a thorough understanding of current municipal services delivered across Ramara Township;
- Assessing weaknesses and threats facing Ramara; and
- Identifying potential improvement opportunities to be further explored in the next phase of the engagement.

Methodology and Approach

Our approach to conducting the Current State Report utilized multiple sources of inputs and extensive engagement, including:

1. Analyzing internal and external data to evaluate current operations;
2. Benchmarking current performance and delivery models against relevant municipal comparators;
3. Conducting 14 interviews with elected officials, senior leadership, and staff from across the Township.
4. Facilitating a cross-functional workshop and focus group based on StrategyCorp's SCOPE methodology; and
5. Identifying initial high-impact improvement opportunities that could lead to cost-savings or revenue generation, efficiencies, or value-added services or operations.

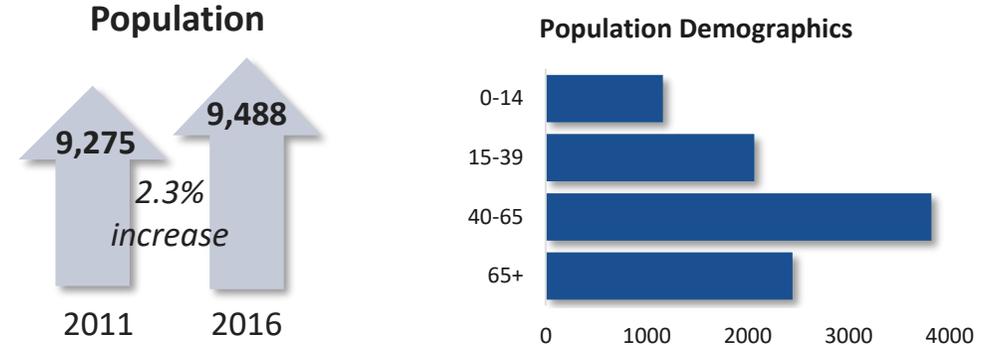
Initial Results

Based on our work to conduct the Current State Report, we have developed:

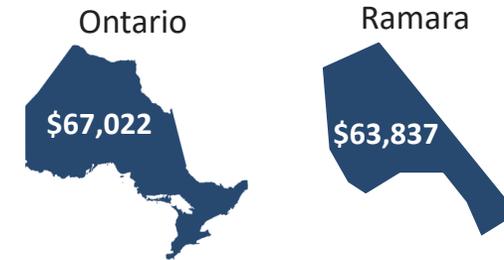
- Department profiles
- An inventory of 29 high-impact improvement opportunities, both enterprise-wide and department specific

Overview

- Tucked away on the east side of Lake Simcoe, the Township of Ramara is positioning itself to support the growth, prosperity, and sustainability of the Township.
- Ramara is a community in transition. With refreshed priorities, the Township aims to ensure that the services they provide not only meet expectations and demand but set the Township up for further success.
- Many of the Township’s strategic priority areas directly support the goals and objectives of this initiative and the overall intent of the Province’s Municipal Modernization Program.
- This Current State Review found that the Township continues to make strategic and operational decisions to clearly define its role as a predictable service deliverer and further strengthen its impact on residents.
- Given the Township’s size and revenue base, a positive culture that maintains a lean, yet effective structure exists.
- These structures and trackable outcomes are not always clearly defined, but standards, often unwritten and embedded in the Township’s culture, exist to hold up the values of the Township.
- Both incremental and transformational areas of service delivery efficiency currently exist within the Township.
- The observations brought forward in this Current State Review are underpinned by the strategic priorities of the Township.



Median After-Tax Household Income



Township Tax Revenue





Potential Areas of Exploration

StrategyCorp's Methodology for Identifying Improvement Opportunities

Ramara's Township-Wide Improvement Opportunities on Slides 8-10 fall within one of the following categories from StrategyCorp's municipal operating framework and are cross-cutting across the Township. Department-specific initiatives on Slides 11-16 are the opportunities that are specific to each department.

StrategyCorp's Municipal Operating Framework



Goals and Strategy

Where does Ramara want to go, and how will it get there?



Services and Service Delivery

How does Ramara's core business—service delivery—help it achieve its goals? Does it have the right service mix to achieve its goals?



Planning and Budgeting

How does Ramara plan and budget for its priorities?



Operations and Policies

How do Ramara's internal operations and policies support its core business and goals?



People and Culture

Does Ramara have the right mix of human capital—both levels and talent—to achieve its goals and support its core business?



Assets

What tangible and intangible assets does Ramara have to achieve its goals and core business?

All initiatives are assessed against their ability to:

- 1) **Reduce costs or generate revenue;**
- 2) **Create operational efficiencies; or**
- 3) **Add value to the Township.**

All initiatives are also assessed against their alignment with Ramara's four strategic priority areas:

- 1) **A workforce that is skilled and motivated;**
- 2) **A community that is involved and engaged;**
- 3) **Operations and services that are defined, prioritized, and sustained;**
- 4) **Growth is promoted, planned, and fostered.**

Township-wide Improvement Opportunities (1/3)

Theme	Opportunity and Rationale	Outcomes	Strategic Alignment	
<p>Goals and Strategy</p>	<p>Opportunity 1: Continue to build 2020 strategic plan priorities with longer-term vision for Ramara.</p> <p>Rationale: Ramara currently lacks a long-term vision with goals for the Township to work towards. Departments need to operationalize enterprise-wide priorities through detailed plans that track and report progress in order to understand how they contribute to achieving Township goals.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	<p>Workforce</p> <p>✓</p>	<p>Community</p>
			<p>Operations</p> <p>✓</p>	<p>Growth</p> <p>✓</p>
<p>Services and Service Delivery</p>	<p>Opportunity 2: Develop a robust service inventory that (1) identifies the service delivery model (in-house, contract, etc.); (2) partnership opportunities; (3) service standards; and (4) key performance indicators and targets.</p> <p>Rationale: Ramara currently lacks a way to assess service levels across its departments and tie service levels to strategic priorities and planning/budgeting. Ramara needs to better understand how service mix, service standards, and funding interact with each other to achieve Township goals.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	<p>Workforce</p> <p>✓</p>	<p>Community</p>
			<p>Operations</p> <p>✓</p>	<p>Growth</p>
	<p>Opportunity 3: Create resident-centric policies for ensuring that community engagement, feedback, and stated need drives service standards where standards are not legislated.</p> <p>Rationale: Though Ramara is improving its customer service and corporate communications, it lacks a coordinated community engagement strategy and protocols to inform customer service and service standards.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation • Efficiencies ✓ Value-Add 	<p>Workforce</p>	<p>Community</p> <p>✓</p>
			<p>Operations</p> <p>✓</p>	<p>Growth</p>

Township-wide Improvement Opportunities (2/3)

Theme	Opportunity and Rationale	Outcomes	Strategic Alignment	
<p>Planning and Budgeting</p>	<p>Opportunity 4: Develop a reserve policy based on capital and operating need in conjunction with the Asset Management Policy (AMP).</p> <p>Rationale: Ramara’s reserves have grown significantly in the last five years and state the need for a policy to oversee that growth and ensure it supports long-term capital planning.</p>	<ul style="list-style-type: none"> ✓ Cost-Savings/Revenue Generation • Efficiencies ✓ Value-Add 	Workforce	Community
	<p>Opportunity 5: Realign budget to better reflect the costs and revenues of each department while continuing to be easily compliant with MMAH FIR reporting requirements.</p> <p>Rationale: While current budgeting practice aligns with the required FIR reporting, it does not completely align with functional departments, so some directors do not understand or play a large role in managing budgets.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation • Efficiencies ✓ Value-Add 	<p>Operations</p> <p>✓</p>	<p>Growth</p> <p>✓</p>
			Workforce	Community
			<p>Operations</p> <p>✓</p>	<p>Growth</p> <p>✓</p>
<p>Operations and Policies</p>	<p>Opportunity 6: Design an enterprise-wide IT strategy that prioritizes digitization of information management and service delivery.</p> <p>Rationale: Staff across departments noted the lack of consistency in software use (and training) and information management procedures, creating inefficiencies.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	<p>Workforce</p> <p>✓</p>	Community
			<p>Operations</p> <p>✓</p>	Growth
	<p>Opportunity 7: Standardize procurement policies across departments to support strategic sourcing.</p> <p>Rationale: Staff noted that one-off requests and siloed planning is likely leading to increased costs and process inefficiencies.</p>	<ul style="list-style-type: none"> ✓ Cost-Savings/Revenue Generation ✓ Efficiencies • Value-Add 	Workforce	Community
			<p>Operations</p> <p>✓</p>	<p>Growth</p> <p>✓</p>

Township-wide Improvement Opportunities (3/3)

Theme	Opportunity and Rationale	Outcomes	Strategic Alignment	
<p>Operations and Policies</p>	<p>Opportunity 8: Undertake a contract review by department and develop a contract oversight policy to ensure best value for money for contracted services.</p> <p>Rationale: Ramara’s staffing mix is quite different from its peers, and it spends more on wages and contracted services than its peers do. While contracted services can be cost effective, implementing contract management best practices and training can ensure it is getting best value for money for contracted services.</p>	<p>✓ Cost-Savings/Revenue Generation</p> <ul style="list-style-type: none"> • Efficiencies • Value-Add 	<p>Workforce</p> <p>✓</p>	<p>Community</p>
			<p>Operations</p> <p>✓</p>	<p>Growth</p>
<p>People and Culture</p>	<p>Opportunity 9: Develop a human resources strategy and plan that accounts for succession planning and incorporates cross-training.</p> <p>Rationale: As noted, Ramara’s staffing mix is different from peers, and it spends more on contracted services than its peers. The plan should identify optimal staff mix, identify clear position responsibilities and areas for cross-training, and establish consistent and accessible training policies and programs, especially for information technology.</p>	<p>✓ Cost-Savings/Revenue Generation</p> <p>✓ Efficiencies</p> <p>✓ Value-Add</p>	<p>Workforce</p> <p>✓</p>	<p>Community</p>
			<p>Operations</p> <p>✓</p>	<p>Growth</p>
<p>Assets</p>	<p>Opportunity 10: Through the AMP, include policies that require Finance and Infrastructure work together to manage and oversee the AMP.</p> <p>Rationale: The Finance and Infrastructure Departments are critical in long-term capital planning and should work closely to plan for major asset purchasing and maintenance.</p>	<p>✓ Cost-Savings/Revenue Generation</p> <p>✓ Efficiencies</p> <p>✓ Value-Add</p>	<p>Workforce</p>	<p>Community</p>
			<p>Operations</p> <p>✓</p>	<p>Growth</p> <p>✓</p>

Department-Specific Improvement Opportunities (1/6)

Department	Opportunity and Rationale	Outcomes	Strategic Alignment	
<p>Executive Services Department</p>	<p>Opportunity 11: Develop a communications master plan that includes internal and external communications and social media policies to ensure consistent and collaborative communication.</p> <p>Rationale: Ramara has been improving communications with staff and residents but lacks a coordinated approach.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation • Efficiencies ✓ Value-Add 	Workforce	<p>Community</p> <p>✓</p>
	<p>Opportunity 12: Design an economic development strategy that aligns with the Township’s long-term goals, including a plan for the Rama Road Corridor and a review of the development charge (DC) strategy.</p> <p>Rationale: Growth is a priority, and Ramara lacks long-term economic development planning and receives less revenues from DCs compared to peers. It should review this strategy to determine its effectiveness in supporting growth and impact on municipal property tax rate.</p>	<ul style="list-style-type: none"> ✓ Cost-Savings/Revenue Generation • Efficiencies • Value-Add 	Workforce	Community
	<p>Opportunity 13: Develop a part-time role within the strategic initiatives function to apply for and manage grants.</p> <p>Rationale: Ramara’s conditional grants fluctuate over time, and it receives less than its peers. It may be missing out on important revenue streams. A dedicated resource for grant applications may have—or develop—expertise in knowing what grants to apply for, when to apply, and how to apply effectively to maximize external revenue opportunities.</p>	<ul style="list-style-type: none"> ✓ Cost-Savings/Revenue Generation • Efficiencies • Value-Add 	Workforce	Community
			Operations	Growth
			Operations	<p>Growth</p> <p>✓</p>
			Operations	Growth

Department-Specific Improvement Opportunities (2/6)

Department	Opportunity and Rationale	Outcomes	Strategic Alignment	
<p>Finance Department</p>	<p>Opportunity 14: Implement online service delivery for tax bill look up, utility bill look-up, paying for dog tags, among others, to improve resident services. In addition, see Opportunity 18 on more payment options.</p> <p>Rationale: Ramara’s residents consistently ask for more online service delivery for payments. Though an initial investment in additional digital technologies, this could create efficiencies and cost-savings in the long-term.</p>	<ul style="list-style-type: none"> ✓ Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	<p>Community</p> <p>✓</p>
	<p>Opportunity 15: As part of an enterprise-wide resident engagement strategy, develop a corporate, customer-care policy that sets service standards, including integration of all inquiries and complaints within the Finance Department through cross-training and a centralized logging and reporting.</p> <p>Rationale: Many departments respond and log their own customer inquiries, leading to varying levels of service for residents across the organization.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	<p>Community</p> <p>✓</p>
	<p>Opportunity 16: Codify collaborative and cross-departmental budgeting process that includes sharing quarterly updates with departments and Council.</p> <p>Rationale: Ramara is moving towards a more collaborative budgeting process and should formalize this practice to provide staff more direction within their departments and across the organization to better advise Council.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	Community
			Operations	Growth
			Operations	Growth
			Operations	Growth

Department-Specific Improvement Opportunities (3/6)

Department	Opportunity and Rationale	Outcomes	Strategic Alignment	
<p>Legislative and Community Services Department</p>	<p>Opportunity 17: Ramara needs a renewed vision for recreation services that aligns community need with Township’s AMP. As part of this, it should (1) consider a reorganization to include Parks and Trails in the department; (2) move Community Centre Boards under the Recreation Supervisor; and (3) remove duplication in programming between recreation and libraries.</p> <p>Rationale: Staff have noted that Ramara is unable to meet recreation demand, suggesting it may be underservicing the community in certain areas and may need to set a new vision for recreation services. Staff suggested that the current organizational structure creates barriers to a holistic approach to managing recreation services.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	<p>Community</p> <p>✓</p>
	<p>Operations</p> <p>✓</p>		Growth	
	<p>Opportunity 18: Offer more services through Ramara Centre, like payments for utilities, dog tags, etc.</p> <p>Rationale: Residents have voiced the need for “one-stop-shop” locations for services. Ramara has the technology to support these residents needs to improve service delivery.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	<p>Community</p> <p>✓</p>
	<p>Operations</p> <p>✓</p>		Growth	
	<p>Opportunity 19: Implement an online bylaw portal and bylaw complaint feature on the website.</p> <p>Rationale: Ramara residents and staff have voiced the need for more online services, including a bylaw portal and bylaw complaint. A lack of organized bylaws and record keeping has led the Township to duplicating work and, in some cases, contradicting bylaws.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	<p>Community</p> <p>✓</p>
	<p>Operations</p> <p>✓</p>		Growth	

Department-Specific Improvement Opportunities (4/6)

Department	Opportunity and Rationale	Outcomes	Strategic Alignment	
Infrastructure Department	<p>Opportunity 20: Investigate current work order process to facilitate better tracking and evaluation of infrastructure service delivery.</p> <p>Rationale: Ramara residents and staff often have complaints about infrastructure service delivery (particularly roads and water), and the ability to communicate service standards and report on overall performance would support future initiatives.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	Community 
			Operations 	Growth
Building Department	<p>Opportunity 21: Explore combining building and planning departments to facilitate further streamlining, enhance capacity for specific activities, and continue collaboration through cross-training.</p> <p>Rationale: Staff identified that the departments collaborate frequently and share similar service delivery needs. The Building Department’s permit backlog and increasing applications load justify exploring alternative organizational structures and/or methods of accessing surge capacity from internal or external sources.</p>	<ul style="list-style-type: none"> ✓ Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce 	Community
			Operations 	Growth
	<p>Opportunity 22: As part of the IT strategy, invest in digital tools to facilitate digital inspections, approvals, etc. as well as online applications and payments.</p> <p>Rationale: Users of this department services have addressed need for online department interface, especially for seasonal residents and contractors. Digital tools integrated with Infrastructure and Planning can streamline this function.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	Community
			Operations 	Growth

Department-Specific Improvement Opportunities (5/6)

Department	Opportunity and Rationale	Outcomes	Strategic Alignment	
<p>Planning Department</p>	<p>Opportunity 23: As part of the IT strategy, invest in digital planning tools like digital mapping and zoning.</p> <p>Rationale: The Planning Department uses outdated tools for planning and asset mapping. Digital tools integrated with Infrastructure and Building can streamline planning functions.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Workforce	Community
	<p>Opportunity 24: Align Township long-term goals to Planning Department activities and the economic development strategy.</p> <p>Rationale: Ramara’s Planning Department does minimal work for the Official Plan, and projects are driven by resident demand and not Township priorities, so growth and development are not coordinated.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	<p>Operations</p> <p>✓</p>	<p>Growth</p> <p>✓</p>
			Workforce	Community
	<p>Opportunity 25: Review mutual and automatic aid agreements to ensure (1) reciprocity is equal and (2) scope creep is prevented.</p> <p>Rationale: Ramara has several mutual and automatic aid agreements. For its agreements, it should ensure reciprocity is balanced. In places of imbalanced mutual aid or large volumes of automatic aid, it may have opportunities to provide services for a fee to recover costs or generate revenue.</p>	<ul style="list-style-type: none"> ✓ Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	Operations	<p>Growth</p> <p>✓</p>
Workforce	Community			
<p>Fire and Rescue Services Department</p>	<p>Opportunity 26: Review fleet size and either charge for fleet use or divest/phase out assets.</p> <p>Rationale: Ramara has a larger fire and rescue fleet compared to peers with several specialized assets due to its unique service offering mix. It should find ways to gain revenue through those assets and, in some cases, like HazMat, consider alternative service delivery models or divestment.</p>	<ul style="list-style-type: none"> ✓ Cost-Savings/Revenue Generation • Efficiencies • Value-Add 	Workforce	Community
			<p>Operations</p> <p>✓</p>	Growth

Department-Specific Improvement Opportunities (6/6)

Department	Opportunity and Rationale	Outcomes	Strategic Alignment	
<p>Fire and Rescue Services Department</p>	<p>Opportunity 27: Evaluate Fire and Rescue Services offerings and service levels.</p> <p>Rationale: Ramara’s Fire and Rescue Services are highly respected in the community and region, and Ramara has specialized rescue services and accompanying assets based on its community risk assessment. Reviewing call volumes and service levels may uncover opportunities to work with neighbouring municipalities to provide and receive services, allowing for more specialization among neighbours.</p>	<p>✓ Cost-Savings/Revenue Generation</p> <ul style="list-style-type: none"> • Efficiencies • Value-Add 	Workforce	Community
	<p>Opportunity 28: As part of the overall IT strategy, invest in technology for digital inspections, reports, training logs, performance tracking, etc. for Fire and Rescue Services.</p> <p>Rationale: This department has service standards and performance indicators and could better track data with mobile, digital capabilities.</p>	<ul style="list-style-type: none"> • Cost-Savings/Revenue Generation ✓ Efficiencies ✓ Value-Add 	<p>Operations</p> <p>✓</p>	Growth
			<p>Workforce</p> <p>✓</p>	Community
	<p>Operations</p> <p>✓</p>	Growth		
<p>Libraries Department</p>	<p>Opportunity 29: Work with the Library Board to decide if and how to support the library’s strategic goals and how to support facility improvement.</p> <p>Rationale: The Library Board has strategic priorities but requires Township funding to achieve its goals. Furthermore, the Township runs its rental space, so capital improvements will require Council support.</p>	<p>✓ Cost-Savings/Revenue Generation</p> <ul style="list-style-type: none"> • Efficiencies ✓ Value-Add 	Workforce	<p>Community</p> <p>✓</p>
			<p>Operations</p> <p>✓</p>	Growth



Project Next Steps

Next Steps - Phase 3 & 4: Future State Planning & Improvement Initiatives

Below are the project next steps which will allow the Township of Ramara to submit a draft final report to the Ministry of Municipal Affairs and Housing by mid-September per the requirements of the Municipal Modernization Program.



1

Confirm project improvement areas, determine needed consultation, and schedule departmental workshops and focus groups with select municipal staff to validate improvement ideas and draft improvement opportunities.

2

Prepare update for July quarterly report.

3

Final report for presentation to Senior Management Team and Council (to be determined).

4

Finalize report for MMAH submission.



Appendix A: Ramara Financial Assessment

Introduction and Data Limitations

StrategyCorp assessed Ramara's financial health according to a number of indicators taken from the Ministry of Municipal Affairs and Housing's Financial Information Return (FIR) data using the returns from 2009-2018 (the most recently reported data). The following slides provide StrategyCorp's analyses of the findings. At the outset, it is important to acknowledge some limitations with the data:

- 2018 data is the most recent data provided in FIR, so all numbers and analyses should be assessed against 2019 and 2020 data when provided.
- Ramara's population and households have fluctuated over time, especially from 2015-2018. It appears as if census data was inputted inconsistently into the FIR reporting. This may skew per capita and per household data points in the following slides, so it is important to be aware of unusual fluctuations in "per capita" or "per household" numbers.

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Population	8631	8355	8197	8212	8204	8110	8110	9490	8102	9488
Total Households	6103	6187	6215	6215	6223	6251	6251	6028	6252	6028

- Ramara's operating deficit from 2012-2015 raised initial red flags. After reviewing the auditor's reports from 2009-2017, StrategyCorp found that, in 2009, Ramara adopted a new way of reporting tangible capital assets as part of their annual financial statements by implementing the Public Sector Accounting Board's requirement that municipal governments amortize their tangible capital assets in their financial statements. Before that, tangible capital assets were reported (expensed) as they were acquired. This appears to have resulted in a restatement of year end figures, resulting in a large surplus. Ramara continued to report capital tangible assets as actual operating expenditures through 2015 but did not include those expenses in their annual operating budget, resulting over time in operating deficits.
- In 2016, Ramara changed its auditor, who started reporting capital tangible assets separately from operating budget and expenses, which appears to have "corrected" the annual deficit problem from 2012-2015. While StrategyCorp typically looks at 5-year and 10-year trends for financial health, where the operating expenses and revenues are noted in the following slides, we have used only 2016-2018 data points in order to use the most accurate data.

Themes and Areas of Exploration

Some general themes emerged from the financial analyses:



- 1 Ramara is generally trending towards financial health and sustainability and is building up reserves at a high rate while reducing debt (Slide 22).** Ramara has been intentional about building savings into its budget. It has a policy that each department may put their surplus funds into their reserve, so they have an incentive to save, which has contributed to the high growth rate. The Treasurer is working to take each department's ten-year capital plans so that costs may be "smoothed over" into the tax rate. It was noted that Ramara lacks a reserve policy to align with capital funding need but is seeking to develop one. Given Ramara's reserve and capital spending trends, StrategyCorp agrees that a reserve policy is a high-impact improvement opportunity, identified in Recommendation 4 on Slide 9, Ramara should develop a reserve policy based on capital and operating need in conjunction with AMP.
- 2 Ramara is receiving less in government transfers over time (Slide 24).** While this decline is partly explained by decreasing OMPF funding, which is determined by a formula, its conditional grant funding significantly fluctuates each year. As stated on in Recommendation 13 on Slide 11, Ramara should create a part-time role within the strategic initiatives function to apply for and manage grants to take advantage of key revenue streams.
- 3 Ramara is meeting nearly all of MMAH's targets for key financial indicators and is trending in positive directions (Slide 25).**
- 4 Ramara's capital spending has fluctuated over time (Slide 27). StrategyCorp is aware that Ramara is looking to improve capital planning and financing along with the development of its AMP.** Historically, Ramara funded capital expenses through debt and is now working to fund capital expenses through reserves.

Preliminary Indicators for Financial Sustainability

LEGEND	Strength
	Explore
	Concern

	2014	2015	2016	2017	2018	Average YoY
Municipal Property Taxes Per Household	\$2,148	\$2,389	\$2,694	\$2,678	\$2,953	7.5%
Total Property Taxes Per Household	\$2,921	\$3,160	\$3,500	\$3,408	\$3,710	5.4%
Annual Operating Expenditures	\$14,266,952	\$14,745,591	\$14,994,816	\$15,028,647	\$16,451,755	3.1%
Annual Operating Expenditures per Capita	\$1,759	\$1,818	\$1,580	\$1,855	\$1,734	-0.3%
Annual Capital Expenditures	\$1,676,196	\$1,745,705	\$649,273	\$2,313,331	\$1,718,887	0.5%
Annual Capital Expenditures per Household	\$268	\$279	\$108	\$370	\$285	1.3%
Total Reserves	\$1,298,780	\$1,404,472	\$3,060,909	\$5,203,069	\$6,273,534	76.6%
Total Reserves per Household	\$208	\$225	\$508	\$832	\$1,041	80.2%
Municipal Debt Burden per Household	\$1,817	\$1,766	\$1,769	\$1,662	\$1,676	-1.6%
Residential Assessment Percentage	94.2%	94.2%	94.1%	94.1%	94.0%	0.0%
Non-Residential Percentage Assessment	5.8%	5.8%	5.9%	5.9%	6.0%	0.7%
Total Taxable Assessment	\$2,022,284,702	\$2,083,246,344	\$2,160,464,221	\$2,174,165,395	\$2,244,798,672	2.2%
Total Taxable Assessment per Household	\$323,514	\$333,266	\$358,405	\$347,755	\$372,395	3.0%

- All of Ramara's preliminary indicators for financial sustainability suggest that Ramara has generally good financial health. In particular, Ramara's reserves have grown significantly year-over-year from 2014-2018, thanks to its surplus-to-reserve policy, and a reserve growth policy to support long-term capital planning and operational planning will help smooth the tax rate over time. Municipalities may be asked to dip into reserves in response to COVID-19, so policies around reserves for operations may be beneficial for future emergency preparedness.
- Ramara's capital expenditures fluctuated from 2014-2018 with a big increase from 2016-2017. Ramara is improving capital planning, which is further explored on Slide 27. Additionally, Ramara's municipal property taxes grew at double the rate year-over-year of its taxable assessment per household. This trend is because Ramara needed to correct its tax rate to create a more structurally balanced budget. The growth should be closer to inflation over time.

Debt Sustainability

LEGEND	Strength
	Explore
	Concern

	2014	2015	2016	2017	2018	Average YoY
Annual Repayment Limit	\$2,056,830	\$2,472,062	\$2,864,089	\$2,958,828	\$3,285,532	11.9%
Debt Charges as a % of Annual Repayment Limit	34%	26%	25%	24%	21%	-7.4%
Municipal Debt Burden per Household	\$1,817	\$1,766	\$1,769	\$1,662	\$1,676	-1.6%
Net Debt Charges per Household	\$112	\$103	\$117	\$113	\$117	0.9%
Municipal Debt Burden as a % of Operating Revenues	84.2%	77.5%	66.9%	65.0%	57.2%	-6.4%
Municipal Debt Burden as a % of Reserves and Reserve Funds	805.4%	665.1%	286.1%	152.1%	121.6%	-17.0%

- Overall, Ramara is improving its debt sustainability and should maintain current practices.

Revenues, Operating Expenses, Capital Expenses, and Reserves

LEGEND	
	Strength
	Explore
	Concern

115

	2014	2015	2016	2017	2018	Average YoY
Taxes Receivable	\$2,960,307	\$2,631,586	\$2,299,656	\$2,643,894	\$2,305,287	-4.4%
Taxes Receivable as a % of Current Tax Levy	10.4%	6.6%	6.5%	7.6%	6.0%	-8.4%
Accounts Receivable	\$1,009,275	\$1,541,283	\$1,386,256	\$1,558,524	\$1,548,662	10.7%
Government Transfers	\$2,175,165	\$1,798,320	\$1,528,481	\$1,459,005	\$1,413,241	-7.0%
Government Transfers as a % of Total Revenue	16.1%	12.6%	9.6%	9.1%	8.0%	-10.1%
Municipal Property Taxes per Household	\$2,148	\$2,389	\$2,694	\$2,678	\$2,953	7.5%
Annual Operating Expenditures	-	-	\$14,994,816	\$15,028,647	\$16,451,755	3.1%
Annual Operating Expenses per Household	-	-	\$2,488	\$2,404	\$2,729	3.2%
Annual Capital Expenditures per Household	\$268	\$279	\$108	\$370	\$285	1.3%
Capital Ex. as a % of Operating Ex.	12%	12%	4%	15%	10%	-2.2%
Reserves as a % of Municipal Property Tax	17%	16%	31%	50%	55%	43.4%
Total Reserves per Capita	\$160	\$173	\$323	\$642	\$661	62.6%

- As seen in previous slides, Ramara is improving its financial health. One area of note is that Ramara's decrease of current taxes receivable as a percentage of the current tax levy suggest that Ramara is improving its tax collection. As noted in Recommendations 14 and 18 on Slides 12 and 13, introducing additional payment options may continue to lower tax receivables.
- Ramara has had a year-over-year decrease in government transfers. While this is partly explained by decreasing OMPF funding, which is determined by a formula, Ramara's conditional grants have fluctuated. As noted on Slide 46, Ramara is behind its peers on government transfers as a percentage of revenue. Recommendation 12 on Slide 11 suggests that Ramara create a part-time role within the strategic initiatives function to apply for and manage grants.

MMAH's Key Performance Indicators

	2014	2015	2016	2017	2018	Average YoY
Operating Surplus Ratio (Target 0% to 15%)	-	-	7.2%	7.2%	8.4%	5.1%
This is an indicator of the extent to which revenues raised cover operational expenses only or are available for capital funding or other purposes. A negative ratio indicates the percentage increase in rates revenue that would have been required to achieve a break-even result. The basic target: 1% to 15%. Advanced target: > 15%.						
Current Ratio (Target >=1)	0.67:1	0.73:1	1.3:1	2.15:1	2.26:1	47.5%
This is an approximate measure of a municipality's "liquidity" or its ability to pay short-term obligations.						
Rates Coverage Ratio (Target >=40%)	71%	77%	86%	89%	89%	5.0%
This is a measure of the municipality's ability to cover its costs through its own "rates" revenue efforts. Basic target: 40% to 60%. Intermediate target: 60% to 90%. Advanced target: > 90%.						
Debt Service Coverage (Target >=2)	3	3	6	6	6	19.1%
This is a measure of a municipality's ability to service its debt payments. The target is a ratio greater than or equal to 2.						
Asset Sustainability Ratio (Target >90%)	65%	67%	25%	90%	67%	0.6%
This is an approximation of the extent to which a municipality is replacing, renewing or acquiring new assets as the existing infrastructure being managed by the municipality are reaching the end of their useful lives. The target ratio is > 90% per year. A municipality which is not reaching this target is not sufficiently maintaining, replacing or renewing their existing infrastructure. This may result in a reduction in service levels and/or useful lives previously expected and will likely create a burden on future ratepayers.						
Asset Consumption (Target <50%)	38%	40%	42%	44%	45%	3.6%
This measures the age of a municipality's physical assets. It measures the extent to which depreciable assets have been consumed by comparing the amount of the assets that have been used up and their cost. (< 25% - Relatively new infrastructure, 26% to 50% - Moderately new infrastructure, 51% to 75% - Moderately old infrastructure, >75% - old infrastructure)						

- Ramara's performance on MMAH's key performance indicators suggests that Ramara is getting its house in order with regards to financial health and sustainability. As noted in earlier slides, the fluctuation on the asset sustainability ratio suggests that Ramara could improve its capital and asset planning and forecasting, which Ramara is currently working on. StrategyCorp agrees that Ramara should develop a reserve policy to support capital planning, as noted in Recommendation 4 on Slide 9.

10-Year Operating Results

10-Year Operating Results



- As noted at the outset of the financial analysis, Ramara’s operational revenues and expenses over the ten-year period are skewed due to differences in accounting. However, since 2016, Ramara’s total revenues have increased year-over-year by 3.6%, its expenses have increased year-over-year by 3.2%, and its surpluses have increased year-over-year by 10%. Surpluses are all transferred to reserves at the end of the year, and, in recent years, Ramara has been diligent about budgeting for reserve transfers. In summary, Ramara has increased revenues at a higher rate than the rate at which its operating expenses have increased, and its surplus is steadily growing, suggesting improved financial health.

Capital Spending per Household

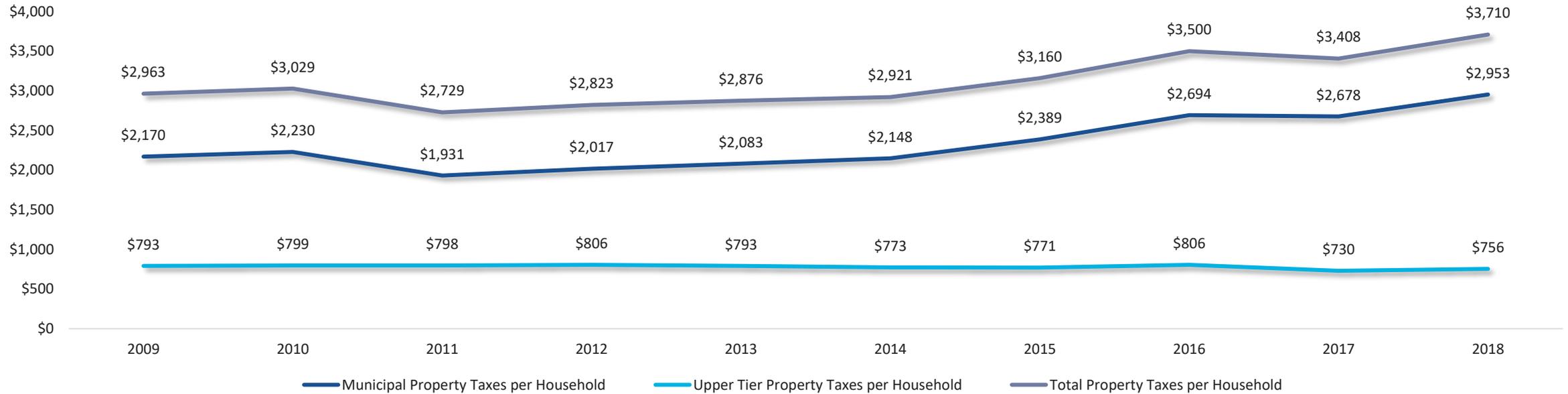
Capital Spending per Household



- As indicated on Slide 22, Ramara's capital spending has fluctuated. One contributing factor to this, however, is that in 2011, Ramara received federal infrastructure funding, which explains the large jump in capital spending in 2011. That said, even in recent years, Ramara's capital spending has fluctuated, suggesting that it needs to improve its long-term capital planning, asset management planning, and capital financing planning. Ramara is already in the process of improving its long-term capital planning, including starting the development of a reserves policy for capital financing, which is described in Recommendation 4 on Slide 9.

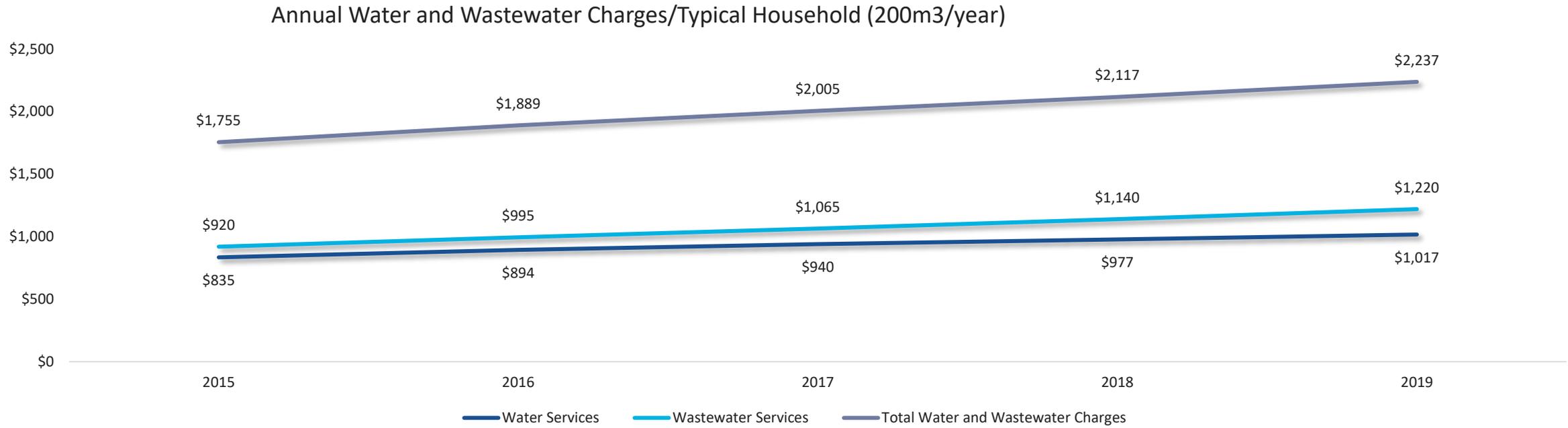
Taxation – Over Time

Lower- and Upper-Tier Property Taxation



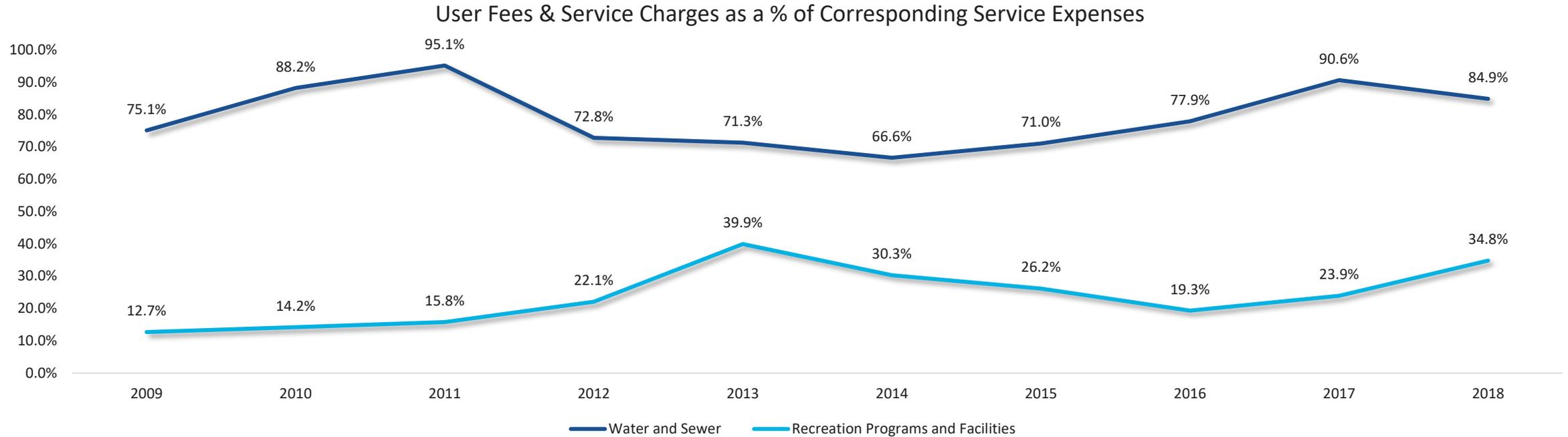
- Ramara’s municipal property taxes have had a ten-year, year-over-year growth average of 3.6% and, as stated in earlier slides, the five-year, year-over-year growth average from 2014-2018 was 7.5%, demonstrating that the increases are growing at a higher rate in recent years. This comes at a time in which the balance of total property taxes (upper-tier and education taxes) are decreasing at an average .5% rate year-over-year.
- It should be noted that the decrease in municipal property taxes in 2011 could be a result of 2010 election commitments.

Water and Wastewater Charges – 2015 Hemson Consulting Study



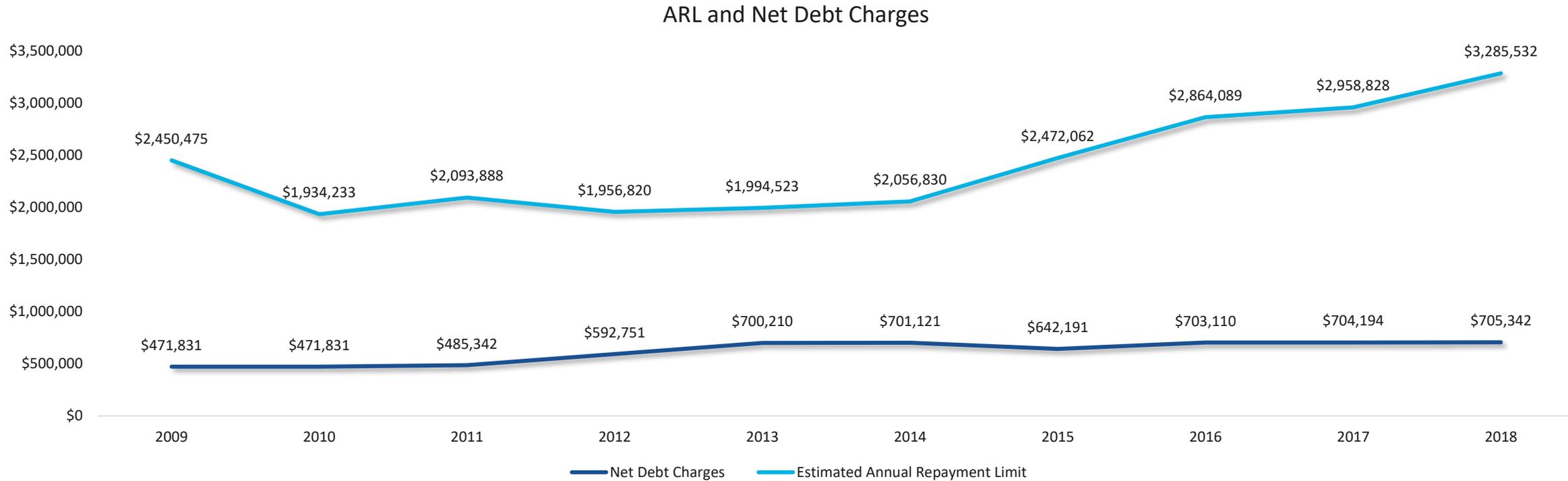
- In 2011, Ramara undertook a water and wastewater rate study after it installed new municipal water meters in 2010, which included recommendations for water and wastewater rates from 2011-2020. In 2015, it retained Hemson Consulting Ltd. to conduct a review and update the water and wastewater rates in light of the previous four years of data. Hemson provided recommended water and wastewater rates from 2015-2024 to fully recover the operating costs and to fully recover capital financing needs. Ramara used the recommended rates from 2015-2019. Its water rates increased year-over-year by 4.4%, and its wastewater services will have increased year-over-year by 6.5%. These types of growth rates are consistent with other municipalities in Ontario. Ramara is in the process of establishing a partnership with the Ontario Clean Water Agency for water and wastewater services to find additional savings and service improvements.

User Fees & Service Charges as a % of Corresponding Service Expenses - Over Time



- Ramara’s user fees and service charges as a percentage of corresponding service expenses have significantly fluctuated over ten years for water and sewer charges. It is important to note, though, that FIR likely includes capital costs and other expenses as part of its overall service expense—not just operating expenses. Ramara fully recovers water and sewer operating costs, and it now recovers 50% of recreation costs. Again, Ramara’s water and sewer rates includes a capital contribution and recreation’s fees include a portion for in-year capital expenses.

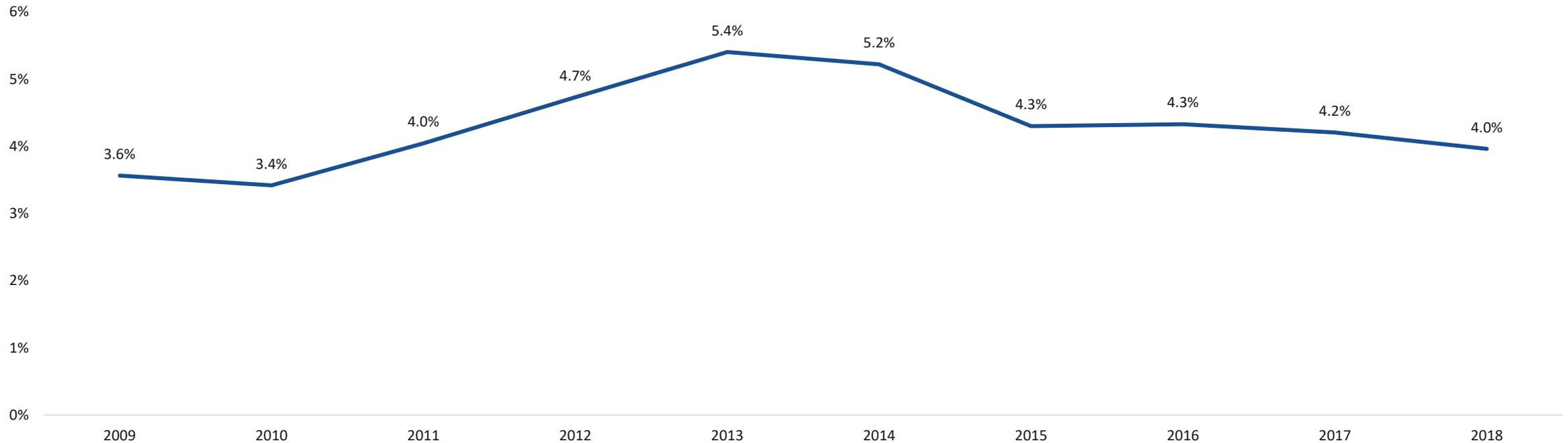
Annual Repayment Limit and Input Factors – Over Time



- After a few years of decreasing annual repayment limit (ARL), Ramara’s overall average, year-over-year increase in ARL is 3.4%. Over the same period, debt charges had an annual year-over-year growth rate of 4.9%. Ramara’s debt charges as a percentage of ARL is steadily decreasing, demonstrating that Ramara is able to take on more debt if needed. However, Ramara’s practice of increasing reserves and its desire to have a reserves policy to support long-term capital planning may prevent Ramara from needing to go into debt for capital expenses.

Net Debt Charges as a Percentage of Municipal Property Tax

Net Debt Charges per Household as a % of Municipal Property Tax



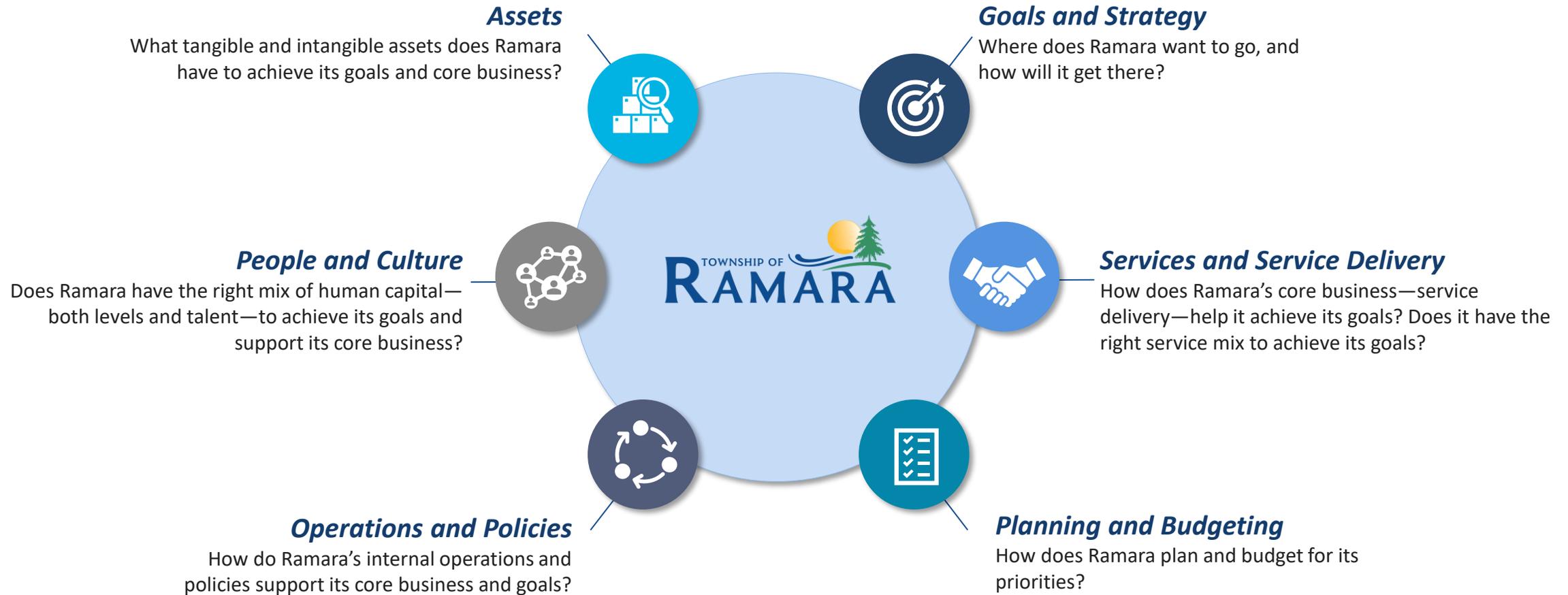
- Ramara's debt charges per household as a percentage of municipal property taxes per household has an average, year-over-year growth rate of 1.1%. Though this rate grew from 2009-2013, Ramara has been able to reverse that growth rate to ensure that less of the municipal property tax is being used to pay debt.



Appendix B: Interview, Workshop, and Survey Findings

Our Methodology and Framework

The following slides present the findings from the interviews, workshops, and survey along the following Township-wide themes. Feedback about specific departments are incorporated into the Current State Departmental Profiles in *Appendix D: Township of Ramara Departmental Profiles*.





Goals and Strategy

Theme	What we heard
Ramara's Vision and Strategic Plan	<ul style="list-style-type: none"> Ramara is in the process of developing a new strategic plan based on the following four priorities: (1) Workforce is skilled and motivated, (2) Community is involved and engaged, (3) Operations and Services are defined, prioritized and sustained, and (4) Growth is promoted, planned and fostered. However, there is not a unified vision of what Ramara's future should look like and how it can be achieved. Ramara needs to undertake a larger visioning process and clearly articulate implementable plans for the departments to achieve goals.
Transitioning to Online Service Delivery	<ul style="list-style-type: none"> There is a strong desire to move towards digital service delivery, but some noted that most of the Township's residents would not utilize online functions at this time. Many categorized Ramara's residents as unable to utilize online services. Ramara is moving towards implementing digital tools to support its services and internal functions, but there are a variety of tools that are not used consistently across departments. The Township needs clearer goals around digital service delivery and digital internal tools and a strategy to achieve them.
Developing Ramara	<ul style="list-style-type: none"> There is a general interest in attracting growth to Ramara, but there is a lack of vision on what Ramara could become, and there is a need to balance interest and aversion to tourism growth. Council has interest in industrial development, but current economic trends may not make that goal feasible. There is unified interest in developing the Rama Road Corridor, but staff and Council acknowledge a partner would be needed, and they would need to invest in sewer and water infrastructure. The Atherly area is another area of potential residential development interest. Ramara lacks an understanding and vision on what its role in the planning process is. Resources have noted that the department is quick to say "no" instead of working with developers and residents to refine planning ideas.



Services and Service Delivery

Theme	What we heard
Service Mix	<ul style="list-style-type: none"> • There is general consensus among Council to prioritize “hard” services, such as roads, water and wastewater, bridges, culverts, etc. over other types of services like recreation or libraries. However, these priorities are not framed in a larger vision for the Township.
Service Standards	<ul style="list-style-type: none"> • Many of Ramara’s services are legislated and, therefore, have clear service standards laid out in the legislation or in Township bylaws. While Ramara works to meet these standards to remain compliant, most departments lack key performances indicators to track performance and progress and to assess service levels. Similarly, most services that are discretionary have historically lacked key performance indicators. • Some departments, such as the Building and Finance Departments, have developed or are developing internal performance indicators and targets, but it is unclear if they are tracking their progress against those targets. • For example, the Building Department has begun instituting informal customer service standards to ensure calls and emails are returned promptly, which is a result of the Building Department’s 2,500-case backlog, with some complaints going back to the early 2000s. Similar standards may be useful in other departments.
Online Service Delivery	<ul style="list-style-type: none"> • While Ramara staff appreciate that many residents do not use digital technology, they do experience demand for more online service delivery and understand the efficiencies that online service delivery can have for residents. Staff across departments know that the Township has a goal to include digital online service delivery, they have indicated ways to use alternative, digital methods of service delivery in their departments. The specifics for each department are discussed in <i>Appendix D: Township of Ramara Departmental Profiles</i>. • Additionally, Ramara is beginning to provide online credit card payments for services across departments. However, this requires the Finance Department to create unique accounts for invoices, which is a time-consuming process. Priority areas for online payments include building/planning services, taxes/utility payment, recreation sign-up, dog tags, and parking tickets, among others.



Services and Service Delivery

Theme	What we heard
Customer Service	<ul style="list-style-type: none"> • Staff and Council have noted that Ramara is continually improving its customer service, and in recent years, has gotten a reputation of strong customer service. Staff across departments note that they prioritize customer service and have stated that residents also appreciate the level of customer service. There is a culture in Ramara in which staff at all levels are willing to help residents who come in for assistance. Furthermore, residents often don't know which department should take their complaint, but staff are diligent in getting the issue to the right person, and they take the time to explain what policy means for residents, as opposed to simply stating the policies and leaving interpretation up to the residents themselves. • Staff are prioritizing customer service in an age in which the methods for communicating broadly with residents is shifting. Loss of the local paper has made meeting mandated notice requirements and general community updates difficult to disseminate. While the webpage has seen many improvements, the Township could continue to improve it into a clear community communication tool along with other modern tool (e.g. social media). • Staff have noted that the use of the online complaint tracking system is inconsistent across departments, and better use of this feature and tracking the data could improve customer service. Mobile access to this tracking system could also be helpful so that those in the field can respond to and track requests. • An issue raised by some managers (and some Councillors), was a feeling that residents believe they can “skip the line” or need to immediately escalated complaints or inquires to get better service levels based on “who you know” or who you talk to. • Staff have noted opportunities to expand the role of the customer service desk operator as they often have long periods where they are underutilized. This could include introducing a corporate-wide logging function (i.e. tickets, complaints etc.), as well as setting this role up as consolidated customer services for all departments, empowering them to access information to be able to address many inquires without needing to transfer into departments.



Planning and Budgeting

Theme	What we heard
Priority Setting	<ul style="list-style-type: none"> • Department management typically set priorities within departments, but reassessment of priorities takes place throughout the year as needed. Some departments' services, like planning and building, are inherently reactive to the community needs, so prioritization can be challenging. Additionally, there is not a lot of formal collaboration in priorities across departments, but there is natural, informal collaboration on priority setting where it makes sense and is needed. • Similar to what was discussed in the Customer Service findings, there is a perception that Council can change priorities frequently and reprioritizes even after budgets have been set (i.e. some residents can "skip the line.")
Budgeting	<ul style="list-style-type: none"> • The budgeting process starts in the summer, and departments typically undertake budgeting efforts independently. That said, many departments that work closely together do informal budgeting activities together to ensure alignment, and there may be opportunities to formalize cross-departmental budgeting to align with Council priorities. Staff have noted that new online technologies like an intranet and consistent use of digital information management tools like Citywide would make collaborative budgeting easier. Staff are generally satisfied with the budgeting and planning for major capital projects. • The senior management team and Council could use additional training on the budgeting process. Attention to capital budgets and understanding how to undergo capital and asset planning should be incorporated into this training.
Purchasing	<ul style="list-style-type: none"> • There is no centralized procurement function within the Township or in Simcoe County, and there are no clear procurement procedures or guidelines in the Township. The Township does not undertake strategic sourcing or collaborative procurement but is interested in the potential cost savings that such a function could provide. Some noted the need for a more competitive processes to select vendors to reduce any perception of "special interests" and to ensure best value for money.



Operations and Policies

Theme	What we heard
Information Management	<ul style="list-style-type: none"> • Some departments have begun successfully integrating technology and software into data collection and record keeping (Keystone, iCompass, Citywide, etc.) but its use is not universal across the administration or even within the departments using them. For example, many departments use the T: Drive, but with their own methods for organizing information. Some of the reasons for lack of consistency were: <ul style="list-style-type: none"> • Lack of training on new technology software, • Lack of interest from staff in incorporating new technology and software due to the time and money constraints, and • Lack of cross departmental alignment on technology and processes, which was the most common reason. • Some staff noted that TOMRMS is a helpful organizational system but not all staff know how to use it properly. • Most work is still done and stored in hard copies. Manual collection of paperwork (reporting, accounts, approvals, etc.) often includes driving paperwork around to acquire proper signatures. For records, this also means documents or records can take a lengthy amount of time to locate or have simply been lost in chains of custody or within the filing system. Asset management records and bylaws seemed to be the two areas with the most challenges with record keeping, which has led to duplication and contradictions. • Many staff noted the need for an employee intranet to improve communications and information management and sharing across the Township.
Online/digital operations	<ul style="list-style-type: none"> • Staff across Ramara noted the ways in which their departments could utilize digital tools to deliver resident services and internal services. • In addition to the feedback on information management technologies, some staff noted the need for managers across the Township to be able to approve and code invoices and the need for submitting forms via email and using e-signatures.



People and Culture

Theme	What we heard
Staffing Levels	<ul style="list-style-type: none"> Staff have noted that while Ramara's staffing levels are in line with comparator municipalities (in response to studies were done on staffing levels), the types of positions within each department should be re-evaluated. Some staff noted that Ramara contracts out a lot of services but are not sure the efficacy of these services and contracts.
Succession Planning and Cross Training	<ul style="list-style-type: none"> Several staff noted that more staff should be cross-trained on activities to fill in for other staff when they are out of office and to make the organization as a whole more lean. Additionally, staff noted the need for more formal succession planning through career mapping and planning, shadowing, and mentorship opportunities.
Continuous Improvement	<ul style="list-style-type: none"> Some staff in the Township lack a mindset of continual improvement and are not willing to be critiqued to be improved upon, whereas others have embraced a culture of continuous improvement. Some noted that Ramara should continue to establish more standardized performance measurement tools to ensure that all staff are continually hitting goals.
Collaboration	<ul style="list-style-type: none"> Many departments have historically worked in siloes, but staff note CAO Pinsent's vision and effort in breaking these down to promote interdepartmental collaboration. Although there are no formalized policies to support departmental interaction, many departments do work close together informally.
Communications	<ul style="list-style-type: none"> Some staff noted the need to improve communications from the top down to staff. Some staff suggested that monthly meeting could be coupled with weekly check-ins. It was felt that this could improve communication without micromanaging. Using digital tools to communicate (e.g., Zoom) could help with the challenges associated with staff being spread across a couple of buildings.
Training	<ul style="list-style-type: none"> In addition to the needed staff training on digital tools to ensure consistent use across the organization, some interviewees noted the need to have more consistent Council and Board training to ensure that these groups can be as effective as possible in their roles as direction-setters and decision-makers.



Assets

Theme	What we heard
Asset Management	<ul style="list-style-type: none"> Most information on assets is not in a shapefile format, making asset tracking difficult. Ramara is working to improve this with the new GIS analyst position. Asset management is a priority for the Township, and staff across departments are aware and involved in the development of the AMP.
Internet Service	<ul style="list-style-type: none"> COVID-19 has highlighted the need to further movement toward online platforms, and, for Ramara, this means increased need of widespread, highspeed internet, and increased VPN access for staff to work remotely.
Shared Asset Opportunities	<ul style="list-style-type: none"> High cost issues with procurement were primarily associated with fleets and equipment purchases, particularly for the Infrastructure and Fire Departments. Several staff and Councillors brought up opportunities to reduce purchases by sharing equipment and services with surrounding municipalities and by sharing more vehicles and equipment within the Township departments.



Appendix C: Peer Benchmarking

Introduction

StrategyCorp's benchmarking research for the Township of Ramara is based on five comparator municipalities who were chosen against six criteria:

Comparison Criteria

- 1. Services Offered:** The peer municipalities should offer similar services to Ramara. This necessitates benchmarking with municipalities that offer water and wastewater treatment and distribution, roads maintenance, parks and recreation, fire and emergency services, etc.
- 2. Lower-Tier:** Given that Ramara is a lower-tier municipality in Simcoe County, we chose three other lower-tier municipalities in Simcoe County and two lower-tier municipalities in neighbouring counties.
- 3. Location:** Preference was given to municipalities in close proximity to Ramara or in similar geographic areas. As stated, three are in Simcoe County, and Brock and Gravenhurst both border Ramara.
- 4. Physical Conditions:** Ramara is a large and rural municipality with a low population density. As such, it would benefit most from a comparison with similarly rural municipalities, based on persons per km². Though Tay has over triple the population density as Ramara, we believe it is a better comparator than other municipalities in Simcoe County given its population size.
- 5. Population and Median Household Income:** The population and median income of the peer municipalities should be roughly similar to Ramara.
- 6. Taxable Assessment:** Given that many homes in Simcoe County and the surrounding regions are vacation properties, it is important to compare to peers with similar total taxable assessment/household.

Comparator Municipalities



	Ramara	Severn	Tay	Tiny	Brock	Gravenhurst
Tier	Lower	Lower	Lower	Lower	Lower	Lower
Location	Simcoe	Simcoe	Simcoe	Simcoe	Durham	Muskoka
Persons/km²	22.7	24.5	72.1	35.0	27.0	23.8
Population	9,488	13,477	10,033	11,787	11,642	12,311
Median Income	\$63,837	\$66,996	\$58,416	\$62,119	\$64,356	\$53,797
Taxable Assessment/ Household	\$372,395	\$373,164	\$237,225	\$380,885	\$315,668	\$393,070

- In the following slides, StrategyCorp compares Ramara to all five comparators and, in some cases, compares Ramara to the Simcoe County peer average and to the non-Simcoe peer average, which is Brock and Gravenhurst. All data is from 2018 FIR reporting or websites.

Themes and Areas of Exploration

Some general themes emerged from the analyses:

- 
- 1** **Though Ramara is hitting nearly all MMAH's targets for key performance indicators, it is behind its peers across five of the six indicators (Slide 45).** While Ramara is hitting the minimum standards for MMAH, its performance is behind peers. Reasons behind this are explored on Slide 45.
 - 2** **Ramara receives less revenue from other municipalities compared to its Simcoe Peers (Slide 46).** . Ramara has many mutual and automatic aid agreements, and it should ensure equal reciprocity with these agreements or find opportunities to be a service provider. As stated in Recommendation 25 on Slide 15, it should ensure mutual aid reciprocity is balanced. In places of imbalanced mutual aid or large volumes of automatic aid, it may have opportunities to provide services for a fee to recover costs or generate revenue.
 - 3** **Ramara receives less in government transfers compared to its peers (Slide 46),** a concern also discussed on Slide 24 and in Recommendation 13 on Slide 11 that recommends Ramara create a function to apply for and manage grants.
 - 4** **Ramara spends more than its Simcoe Peers on "General Government" (Slide 47).** This could be due to differences in reporting and may need to be explored.
 - 5** **Ramara spends more on contracted services compared to its peers (Slide 48).** Contracted service can be cost-effective, but Ramara should undertake a contract management review and develop oversight policies to ensure best value for money as noted in Recommendation 8 on Slide 10.
 - 6** **Ramara's debt sustainability is in line with peers (Slides 53-54).**
 - 7** **Ramara has more fire and rescue assets than peers (Slide 62).** As noted in Recommendations 26 and 27 on Slide 15-16, Ramara should review the fire and rescue service mix and ensure assets match need, resulting in either shared service opportunities for assets or divesting/phasing out.
 - 8** **Ramara has lower development charges (Slide 63).** As noted in Recommendation 12 on Slide 11, Ramara should design an economic development strategy that reviews development charges.

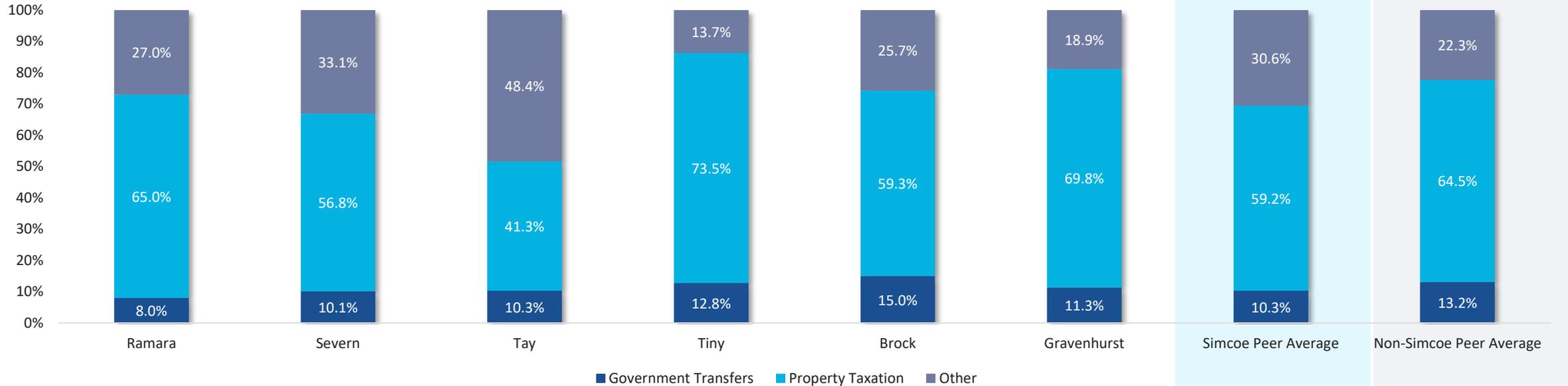
Financial Indicators - MMAH Key Performance Indicators (2018)

	Ramara	Severn	Tay	Tiny	Brock	Gravenhurst	Simcoe Peers	Non-Simcoe Peers
Operating Surplus Ratio (Target 0% to 15%)	8.4%	24.9%	23.3%	-10.5%	19.8%	-5.9%	11.5%	6.9%
Current Ratio (Target >=1)	2.26	11.95	4.59	3.05	8.44	3.65	5.46	6.05
Rates Coverage Ratio (Target >=40%)	88.6%	91.7%	79.7%	70.7%	75.0%	76.9%	82.7%	76%
Debt Service Coverage (Target >=2)	6	11	7	0	52	4	6	28
Asset Sustainability Ratio (Target >90%)	67.0%	159.0%	117.3%	82.8%	118.7%	44.7%	106.5%	81.7%
Asset Consumption (Target <50%)	45.3%	34.2%	34.5%	56.6%	52.7%	59.8%	42.7%	56.3%

- Ramara meets MMAH's standards for its Key Performance Indicators across all categories except for its asset sustainability ratio, as discussed earlier in this report. Overall, these metrics suggest generally good financial health.
- Ramara is behind peer averages for its operating surplus ratio, its current liquidity ratio, debt service ratio, asset sustainability, and asset consumption. Ramara's operating surplus ratio will continue to be lower due to its surplus-to-reserves policy. However, Ramara has a higher rates coverage ratio compared to other Simcoe peers and Brock and Gravenhurst. While this helps Ramara's financial sustainability, Ramara is subsidizing resident service costs less than its peers are, so Ramara residents may feel they pay more for services compared to neighbours (for example, water and sewer charges), even though recovering rates is considered best practice for services.

Financial Indicators - Operating Revenue Breakdown by Source (2018)

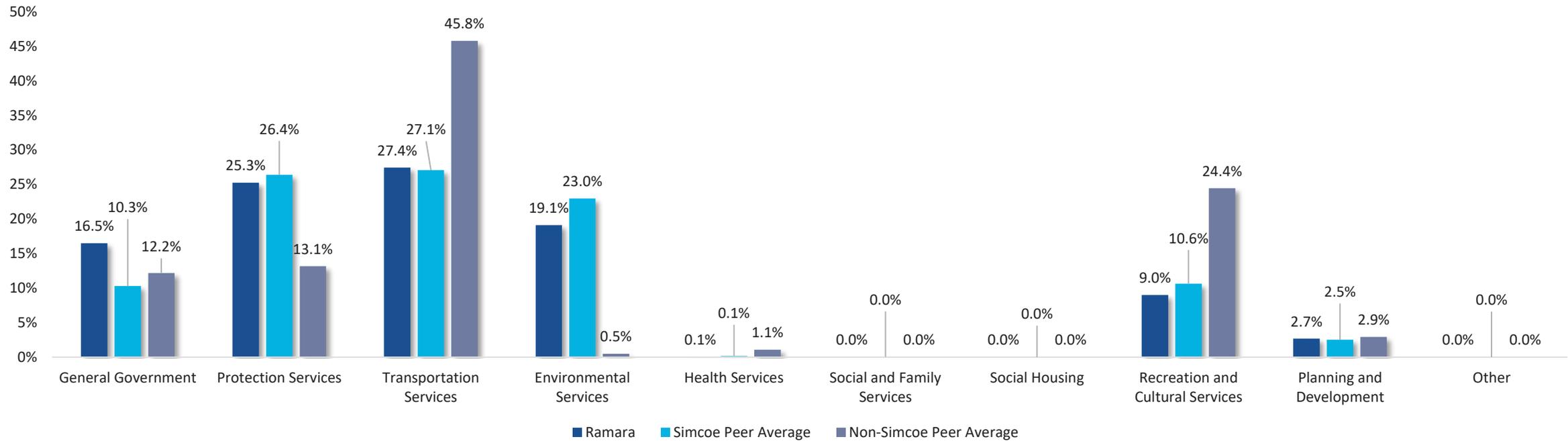
Operating Revenue Breakdown by Source



- Ramara has a higher percentage of its operating revenue from property taxation compared to its peers, receiving less funding from government transfers and less from other revenue sources, which include revenue from other municipalities; user fees and service charges; licenses, permits, and rents; fines and penalties; investment income; interest; deferred revenue earned on development charges and recreational land; and donated tangible capital assets.
- Ramara received \$20,985 from other municipalities in 2018, which is significantly below the Simcoe Peer Average of \$98,262. Ramara has many mutual aid and automatic agreements, and there may be areas of unequal reciprocity. As stated in Recommendation 26 on Slide 15, Ramara should ensure reciprocity is balanced. In places of imbalanced mutual aid or large volumes of automatic aid, it may have opportunities to provide services for a fee to recover costs or generate revenue.

Financial Indicators - Operating Expenditures by Function (2018)

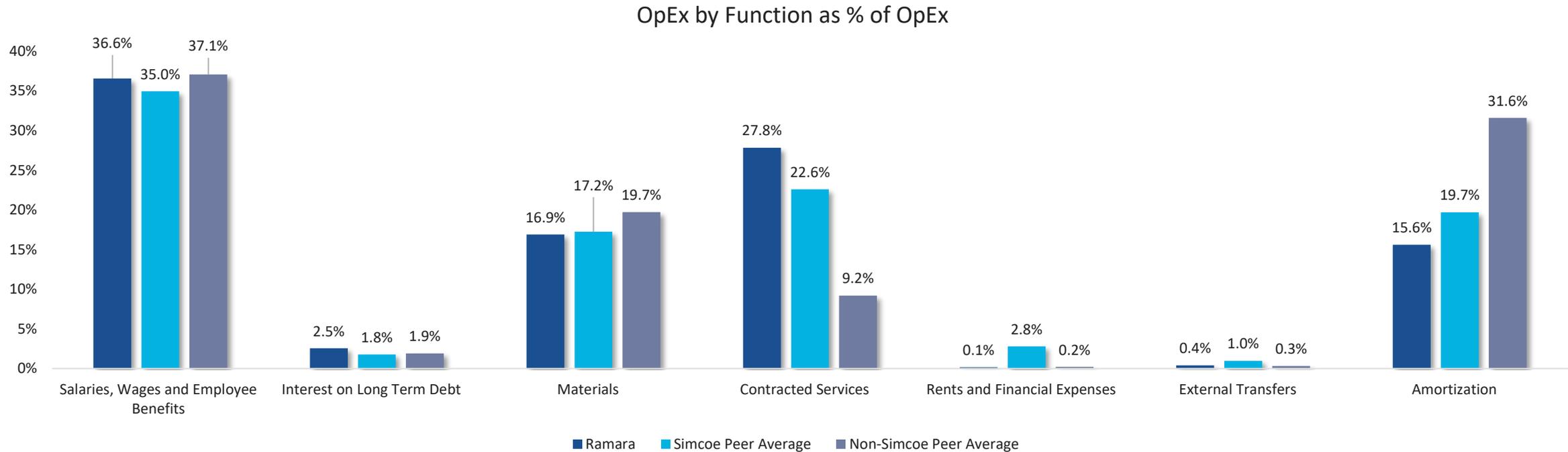
OpEx by Function as % of OpEx



- Ramara operating expenditures by function are generally in line with its Simcoe County Peers. It spends slightly more on “general government” compared to its peers, which may need to be further explored but could be due to differences in reporting.

*Ramara and its comparators spend \$0 on “inter-functional adjustments” and “allocation of program support.”

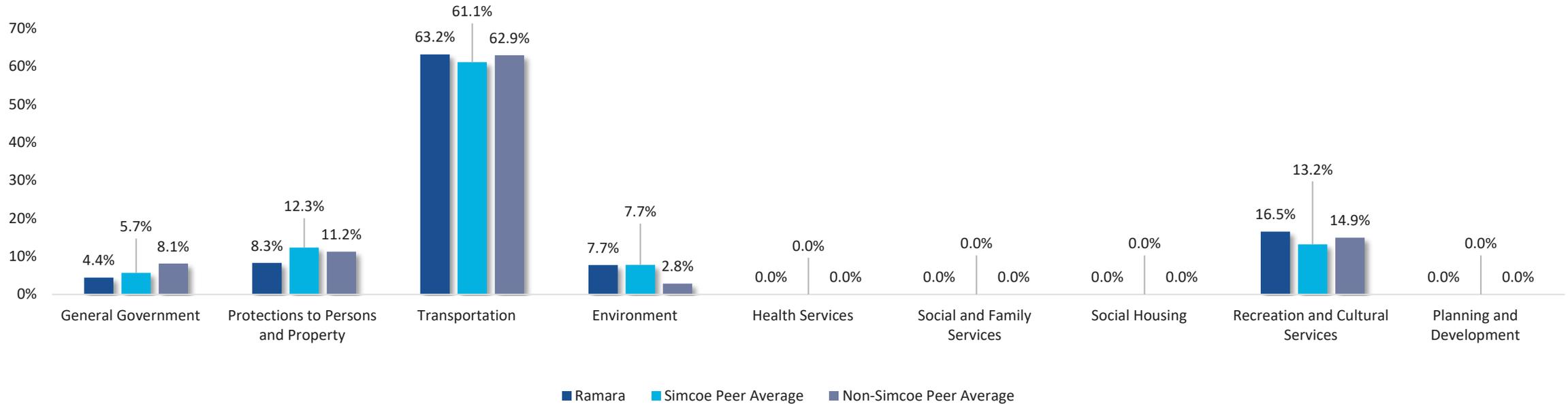
Financial Indicators - Operating Expenditures by Object (2018)



- Ramara spends more on contracted services compared to its peers, and over time, it has trended towards spending less on wages and more on contracted services. In particular, the Infrastructure and Planning Departments utilize contractors. While contracted services can lead to cost-savings where utilization need is low, Ramara should undertake a contract review process and develop contract management policies as noted in Recommendation 8 on Slide 10. Further discussed on Slide 55, Ramara's higher contracting costs and staff mix suggests it may need a more robust succession and cross-training plan to prepare for upcoming retirements and maintain its lean organization.

Financial Indicators - Capital Expense Breakdown by Function (2018)

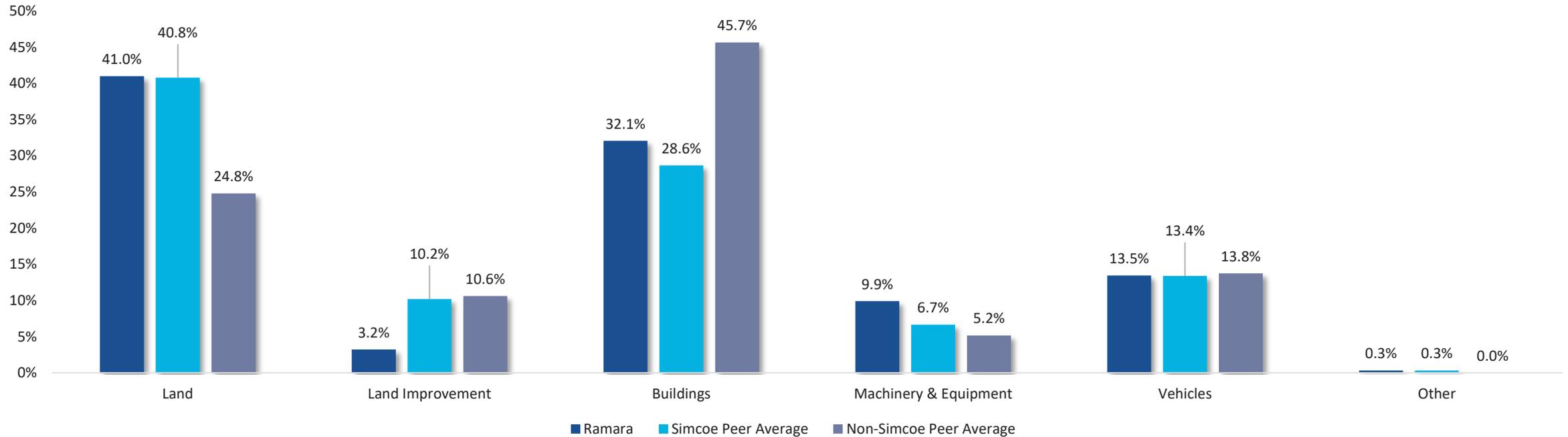
CapEx Breakdown by Function as % of CapEx



- Ramara's capital expenses by functions are generally in line with its peers. Ramara spends slightly more in recreation and cultural services, but its recreation fees cover 50% of costs and include an in-year capital contribution to cover capital financing. However, as noted in Recommend 17 on Slide 13, Ramara needs an updated vision for recreation, which may include adjusted capital assets to recreation vision and goals.

Financial Indicators - Capital Asset Breakdown (2018)

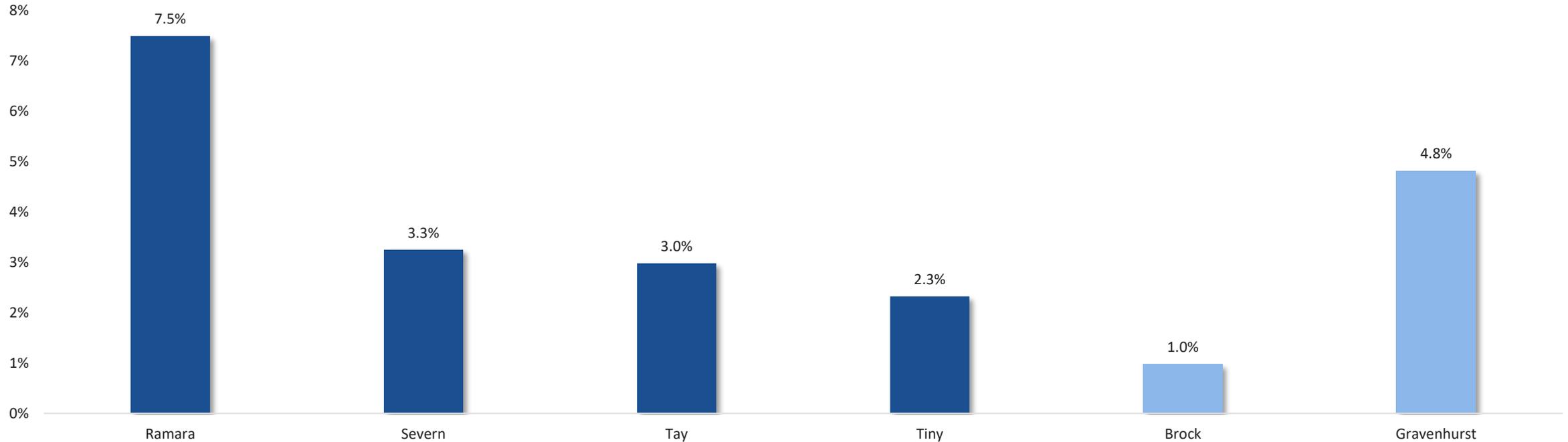
Capital Assets Breakdown by Type as % of Capital Assets



- Ramara is generally in line with its Simcoe Peers, except it invests significantly less in land improvement and more in buildings and machinery and equipment. Land improvement, which would include new paths and trails, has been indicated as potential priorities by Council and staff and may be explored further in a recreation strategy, as indicated in Recommendation 17 on Slide 13.

Financial Indicators – Taxation Growth Rates (2014-2018)

5-Year, Average Year-Over-Year Property Tax Growth

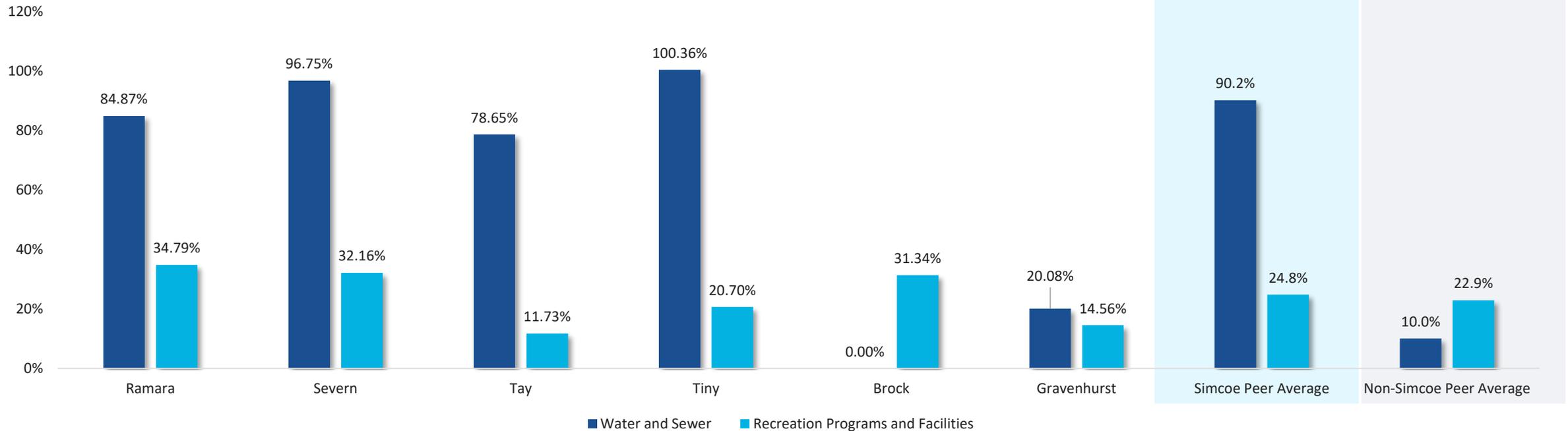


- When looking at the growth trends of municipal property taxes per household from 2014-2018 across Ramara and its peers, Ramara's 5-year, average year-over-year growth rate of 7.5% is higher than all of its peers. The average, 5-year, year-over-year inflation rate over the same period was approximately 1.7%.¹ Ramara and its peers' municipal property tax rates, with the exception of Brock Township, grew higher than the average rate of inflation over the same period. Ramara's high growth rate is due to the fact that it needed to correct its tax rate to create a more structurally balanced budget. As its budget balances over time, Ramara's Council may choose to have its tax rate grow closer to inflation.

1. <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1810025601#timeframe>

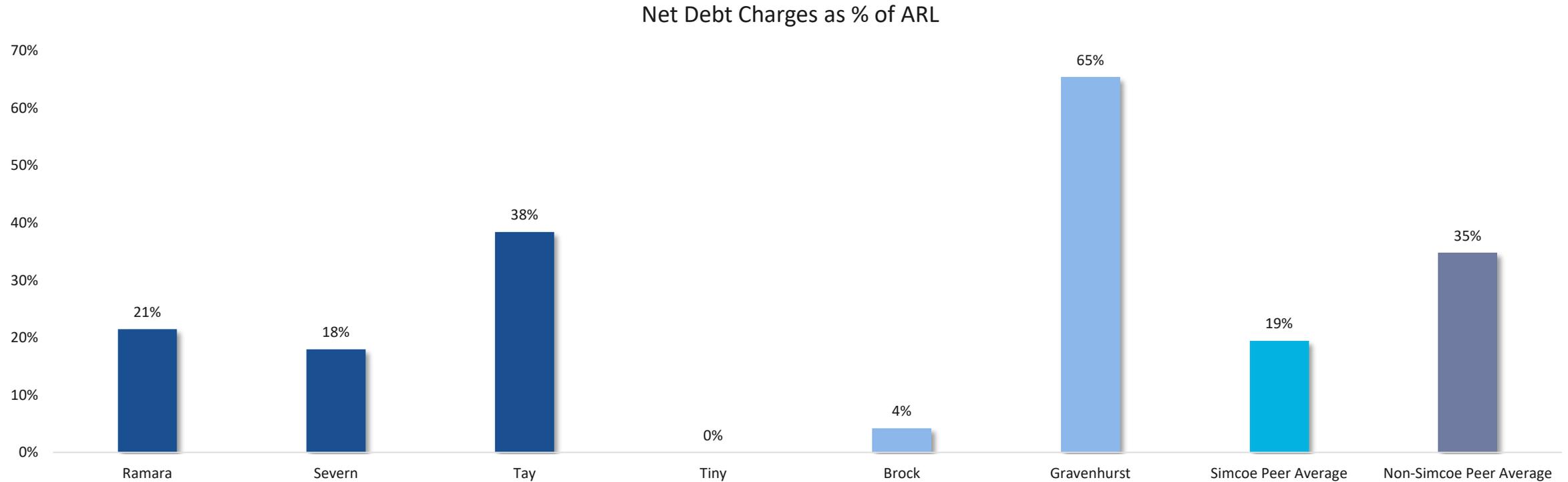
Financial Indicators – Fees and Charges as Percentage of Service Expenses (2018)

User Fees and Services Charges as % of Service Expenses



- As noted on Slide 29, Ramara now fully recovers operating costs for water and sewer, which is considered best practice, and it now recovers 50% of recreation services. Ramara subsidizes less recreation services, which aligns with Council's current priorities. The FIR data may be skewed if service expenses include additional expenses other than operating costs.

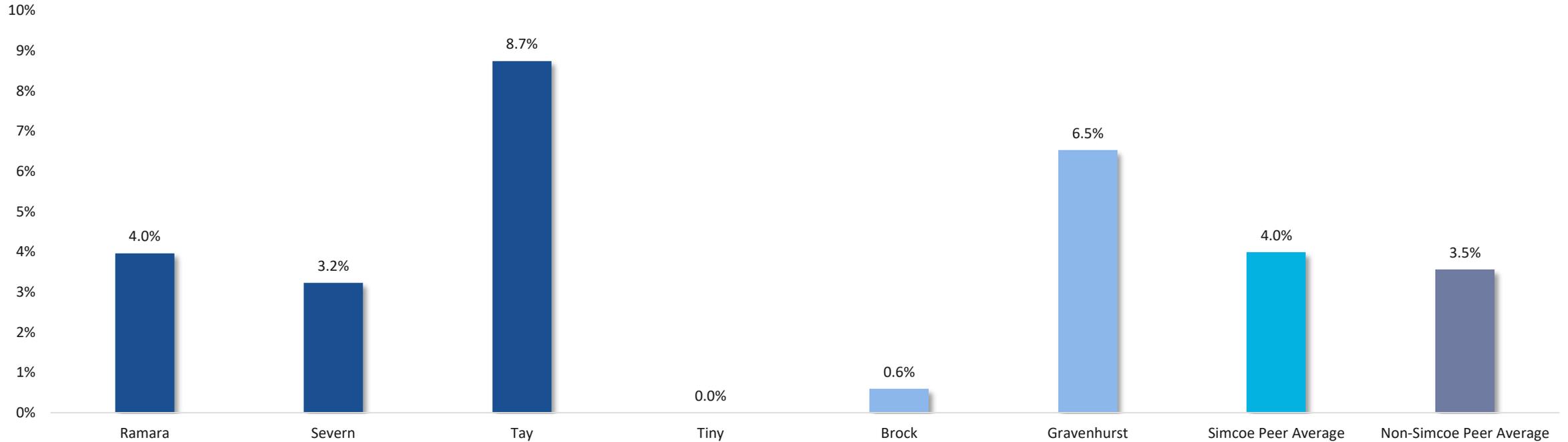
Financial Indicators – Net Debt Charges as a Percentage of Annual Repayment Limit (2018)



- Ramara's debt charges as a percentage of its annual repayment limit is slightly above average, but Tiny's lack of debt charges skew the data. It is performing well compared to other Simcoe Peers. The Simcoe Peers' debt charges as a percentage of annual repayment limit is lower than the non-Simcoe peers, but this may be due to Gravenhurst's recently built community centre.

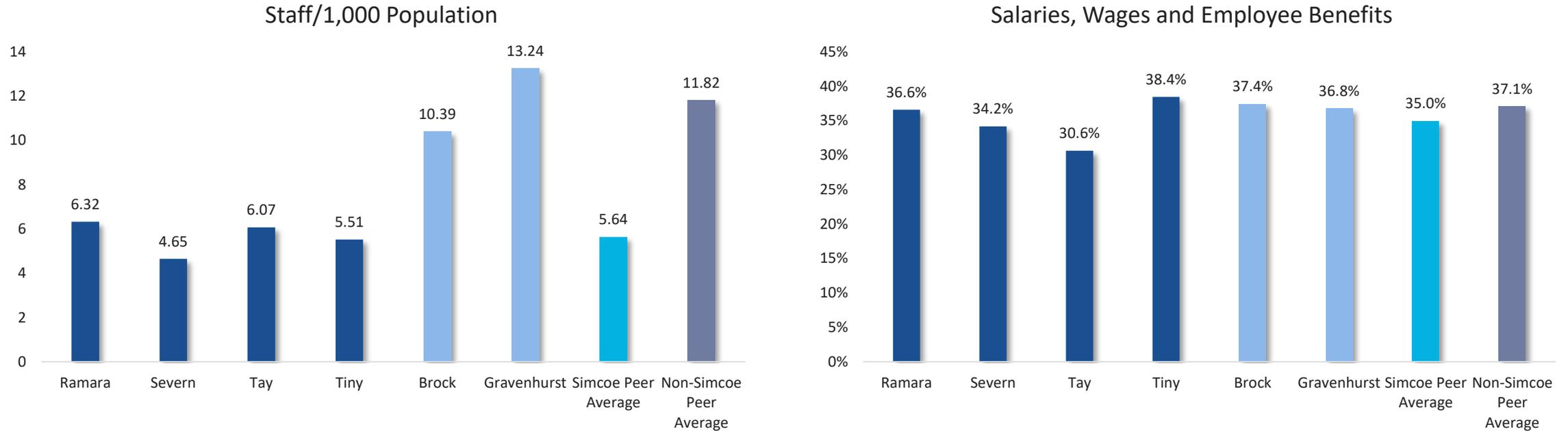
Financial Indicators – Municipal Net Debt Charges as a Percentage Property Tax (2018)

Net Debt Charges/Household as a % of Municipal Property Tax/Household



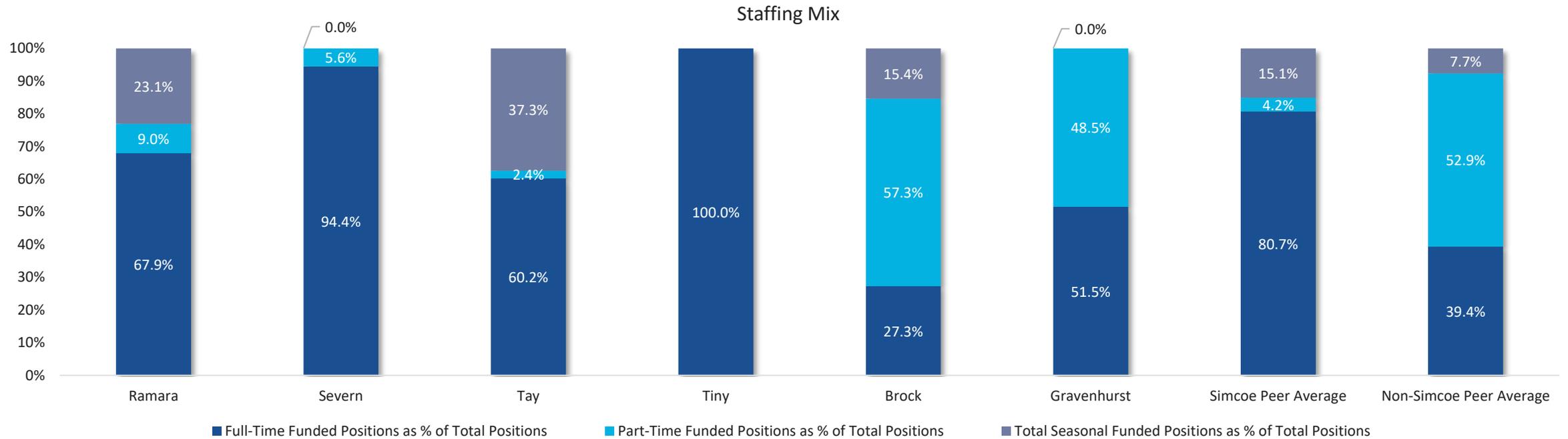
- Ramara's municipal debt charges per capita as a percentage of municipal property taxes is in line with the Simcoe peer average and the non-Simcoe peer average.

Staffing (1/2) (2018)



- Ramara Township's staff per 1,000 persons is slightly higher than the other Simcoe County peers in the comparator group, but not significantly higher. Additionally, while it spends slightly more of its operating expenses on salaries, wages, and benefits, its amount is not a significant outlier. Its average is lower than the non-Simcoe peers, but this may be a function of differences in Simcoe County services compared to other counties. However, as the next slide will demonstrate, there are potential areas for exploration with regards to its full-time, part-time, and seasonal staff mix.

Staffing (2/2) (2018)



Contracted Services as % of Operating Expenses

27.8%

18.7%

21.5%

22.3%

2.5%

15.9%

22.6%

9.2%

- While Ramara has a slightly higher than average municipal staff/1,000 population ratio compared to its Simcoe Peers, it uses more part-time and seasonal workers than its Simcoe County peers. Furthermore, its costs for contracted services as a percentage of its budget is significantly higher than all of its peers, though this should be explored further to assess impact on service need and cost effectiveness as demonstrated in Recommendation 8 on Slide 10. Additionally, as noted in Recommendation 9 on Slide 10, Ramara could explore cross-training employees and undertaking more robust succession planning to ensure its staffing mix supports service need.

Legislative and Community Services Department (1/3)

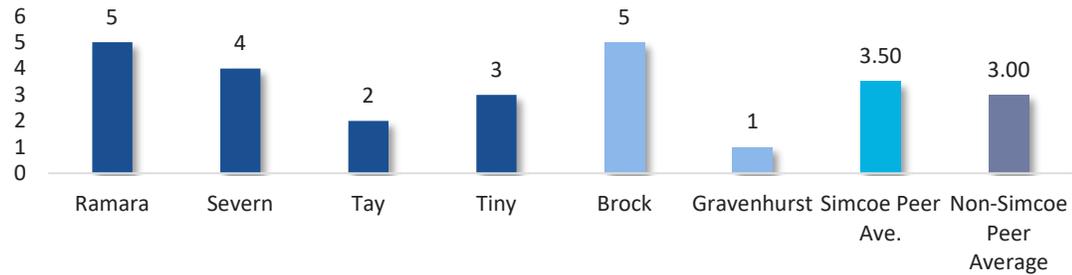
Online Legislative Services Delivery (2020)

	<u>Online Bylaw Portal</u>		<u>Online Bylaw Complaint Submission</u>	
Ramara	No	Ramara does not have an online bylaw portal	No	Ramara does not have online bylaw complaint submission
Severn	Yes	Severn uses Civic Web for its online bylaw portal	Yes	Severn allows residents to submit complaints via email
Tay	No	Tay does not have an online bylaw portal.	No	Tay does not have online bylaw complaint submission.
Tiny	Yes	Tiny uses DocuShare for its online bylaw portal	Yes	Tiny has a complaint submission form embedded on its website
Brock	Yes	Brock uses a website feature for its bylaw database	Yes	Brock has a complaint submission form embedded on its website
Gravenhurst	Yes	Gravenhurst uses Civic Web for its online bylaw portal	Yes	Gravenhurst has a complaint submission form embedded on its website

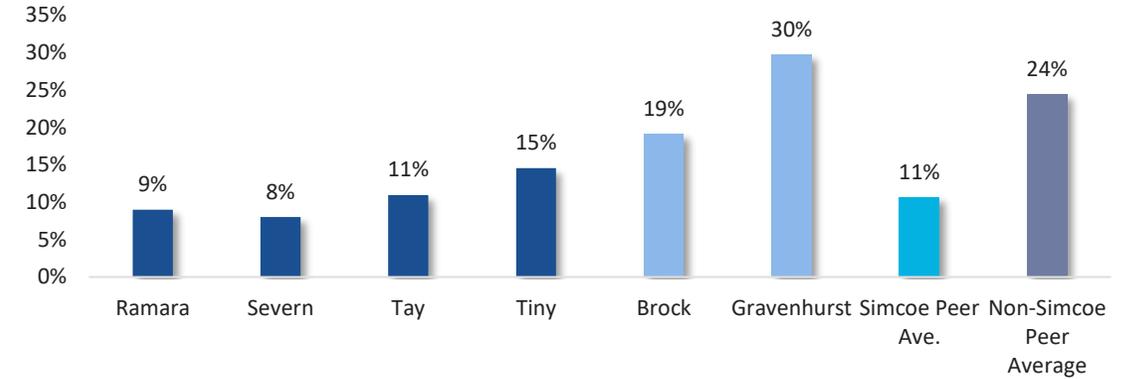
- While Ramara provides some links to its bylaws on its website, it is behind its peers when it comes to online legislative services for residents. Most of Ramara's peers use an online bylaw portal to allow residents to search for bylaws. Civic Web is a common application for a bylaw database, though Tiny uses DocuShare, and Brock has developed its own database and search function which is on its website.
- Ramara and Tay require residents to submit bylaw complaints in person, while most peers have online complain submission forms embedded on websites or allow for email submissions of complaints.
- As noted in Recommendation 19 on Slide 13, Ramara could explore these online methods of service delivery for legislative services.

Legislative and Community Services Department (2/3)

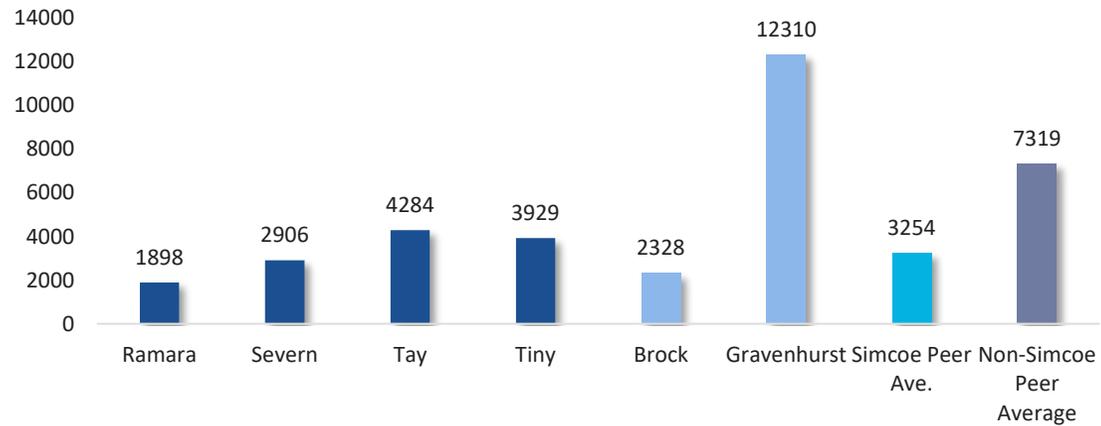
Community Centres/Halls – 2020*



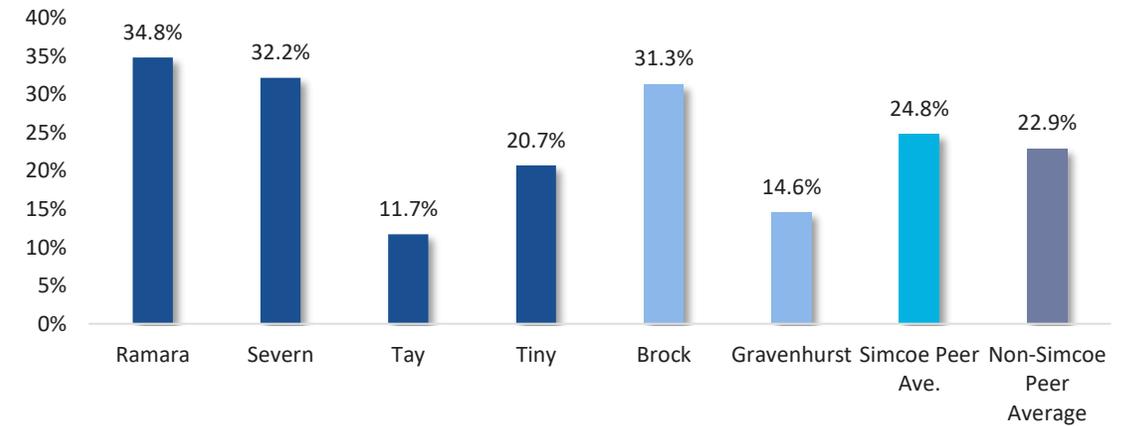
Recreation and Culture as % of OpEx - 2018



Population Served per Centre/Hall – 2018*



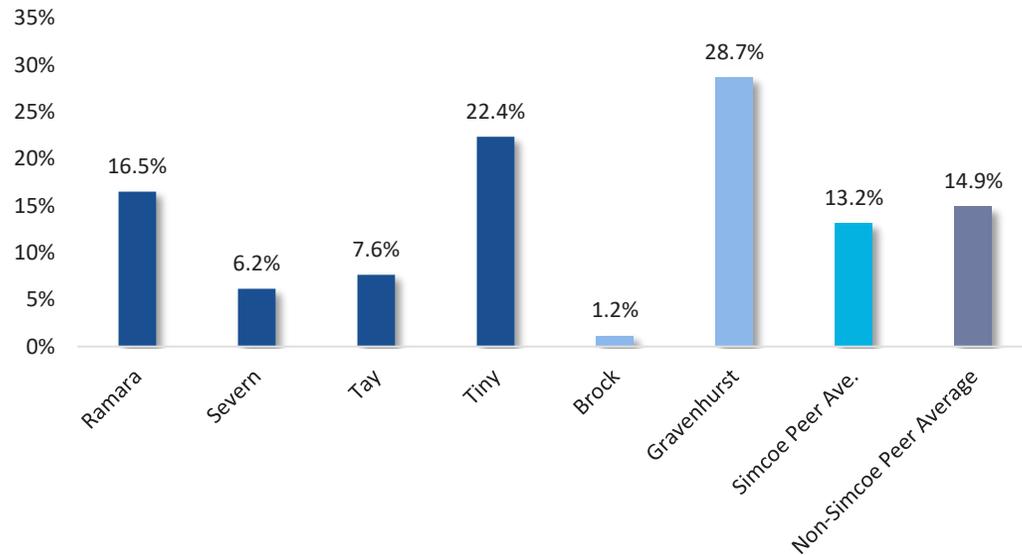
Service Fees as % of Cost for Recreation - 2018



* Please see analysis on following slide for further explanation of Ramara's community centres/halls.

Legislative and Community Services Department (3/3)

Recreation CapEx as % of Total CapEx - 2018



Parks and Recreation in Same Department (2020)

Ramara	Severn	Tay	Tiny	Brock	Gravenhurst
No	Yes	Yes	No	No	No

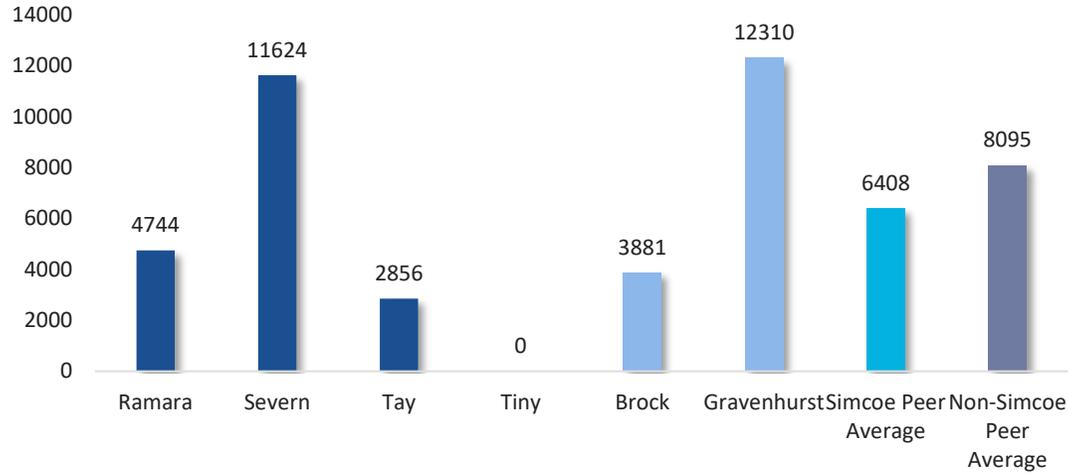
Online Recreation Sign-Up (2020)

Ramara	Severn	Tay	Tiny	Brock	Gravenhurst
No	No	Yes	Yes	Yes	Yes

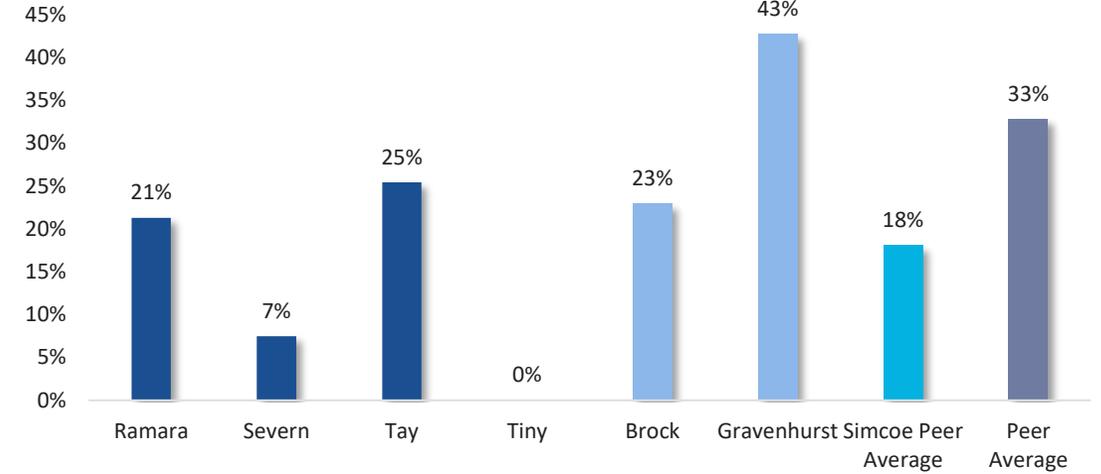
- Ramara has one recreation centre, which is run and managed by Township recreation staff, and four community halls, which are managed by volunteer Boards who run their own programming separate from the Township. Ramara has a higher number of recreation and community centres/halls compared to its peers, but it is important to note that the Ramara Centre is the only facility for Township recreation programming. Though the Township's costs for the four community halls is low (0.36% of the 2020 budget, paid through "Township Grants"), there are opportunities to improve and possibly consolidate the Community Boards, as noted in the recent Board and Committee Review. If consolidation takes place, there also may be opportunities to repurpose some of the community halls for Township recreation programming.
- During interviews, an organizational restructuring to put parks and recreation in the same department was proposed. Staff noted the disconnect between parks maintenance and recreation and proposed cross-training recreation volunteers to maintain parks. Some of Ramara's peers follow this model.
- Additionally, Ramara is behind its peers with regards to online recreation sign-up abilities. It should explore adding online sign-up as a value-add for residents.
- As noted in Recommendation 17 on Slide 13, Ramara needs a new vision for recreation services that reviews service levels and capital assets.

Libraries Department

Population Served/Library - 2020



Active Cardholders/Population - 2018



Number of Library Branches (2020)

Ramara	Severn	Tay	Tiny	Brock	Gravenhurst
2	1	3	0	3	1

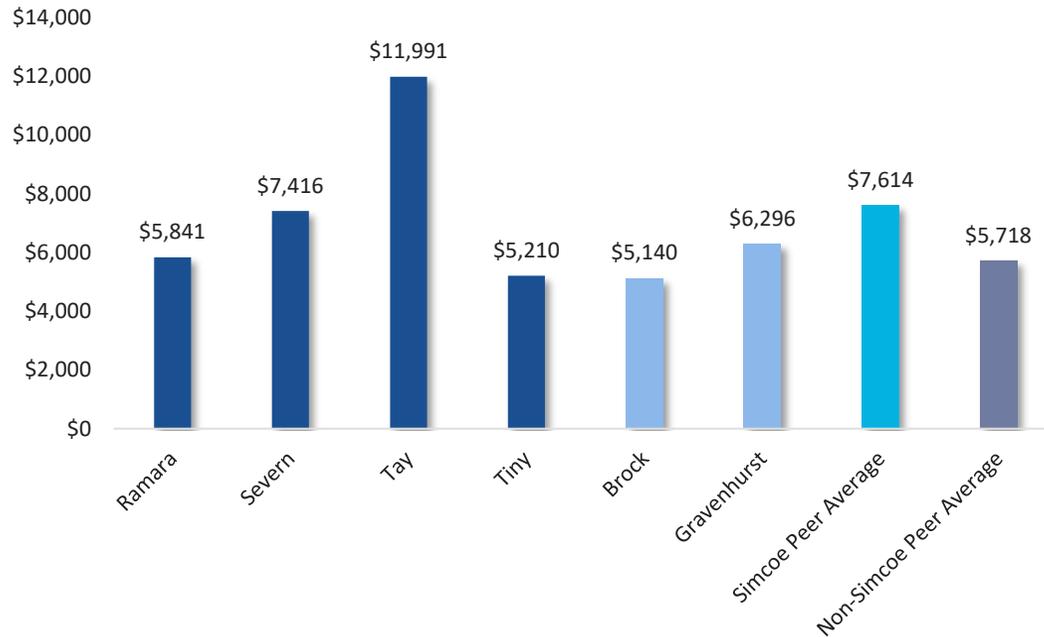
Number of Makerspaces (2018)

Ramara	Severn	Tay	Tiny	Brock	Gravenhurst
0	0	0	-	0	1

- Though Ramara has a lower population served per library than the Simcoe peer average, Severn’s data slightly skews the average. Despite the low population served per library, staff and Council noted that both of Ramara’s library branches currently lack space to do innovative library programming, as one is in the Ramara Centre and another is in the basement of the Brechin Medical Centre. As such, the library lacks optimal space for the services it wants to provide to make the library more innovative, and because the library is run by a separate Board, Council and the Township administration have little control over programming or strategic visioning—which has recently led to some duplication in programming with recreation services. Councillors noted frustration with subsidizing \$400,000-\$500,000 for library services that offer duplicative programming, and, as noted in Recommendation 29 on Slide 16, the Township needs to decide if it will support the library’s strategic goals and provide direction on separating library and recreation programming.

Infrastructure Department (2018)

Value of Tangible Assets/Capita



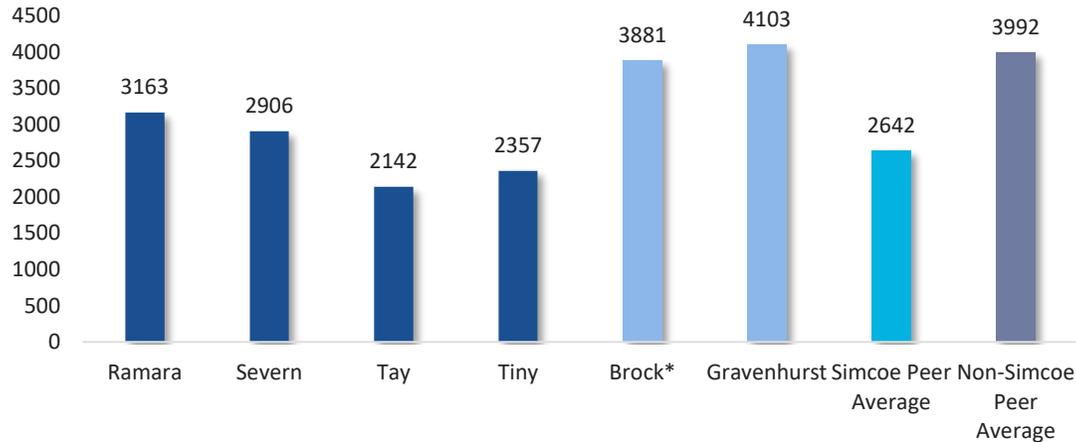
Water and Sewer Charges as % of Expenses

Ramara	Severn	Tay	Tiny	Simcoe Peer Ave.
84.9%	96.8%	78.6%	100.4%	90.2%

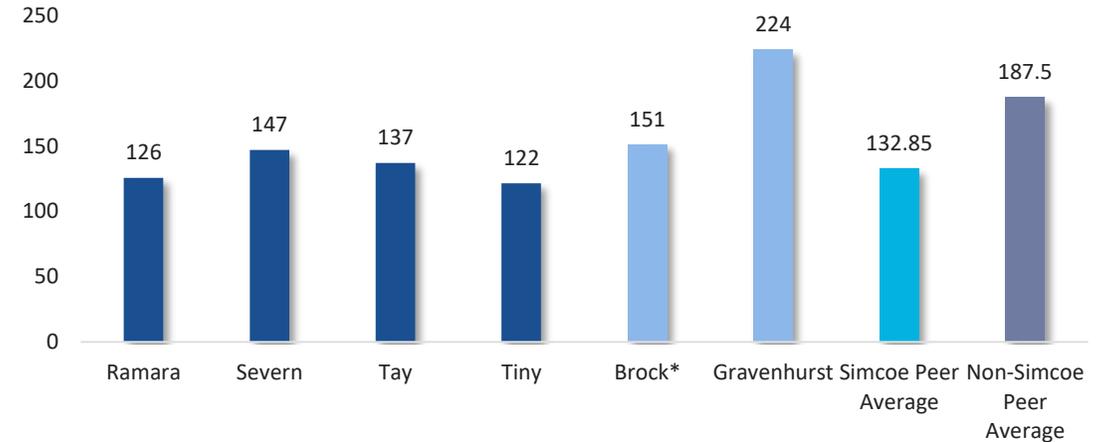
- Ramara now currently fully recovers water and sewer charges, which is a best practice, as do most of its Simcoe Peers.
- Ramara's value of tangible assets/capita is lower than the peer average but not significantly so.

Fire and Rescue Services Department (2020)

Population Served/Fire Station



Population Served/Firefighter Staff**



Number of Fire Stations

Ramara Severn Tay Tiny Brock Gravenhurst

3 4 4 5 3 3

Fleet Size

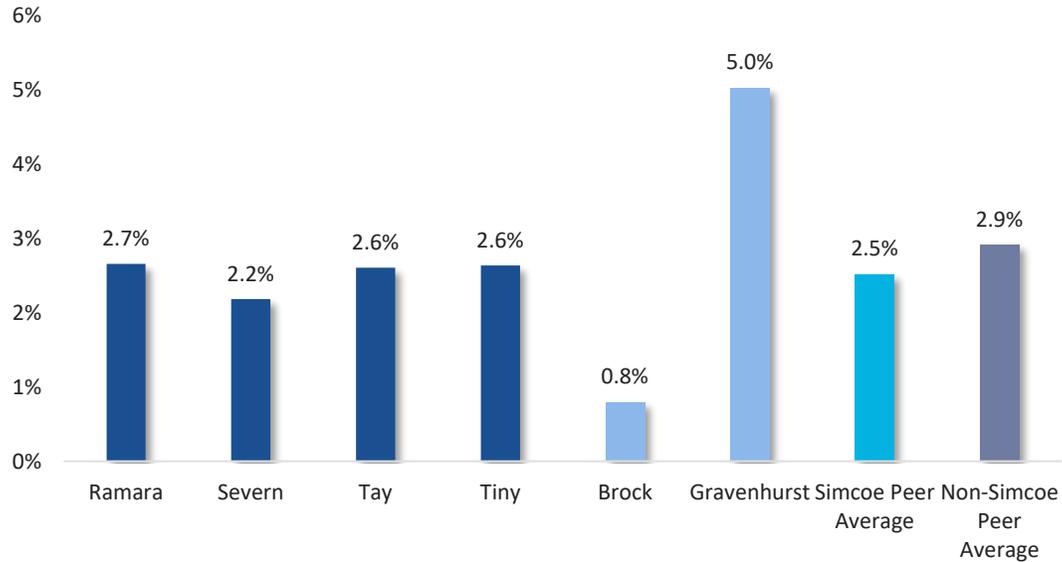
Ramara Severn Tay Tiny Brock Gravenhurst

19 - - 17 13 10

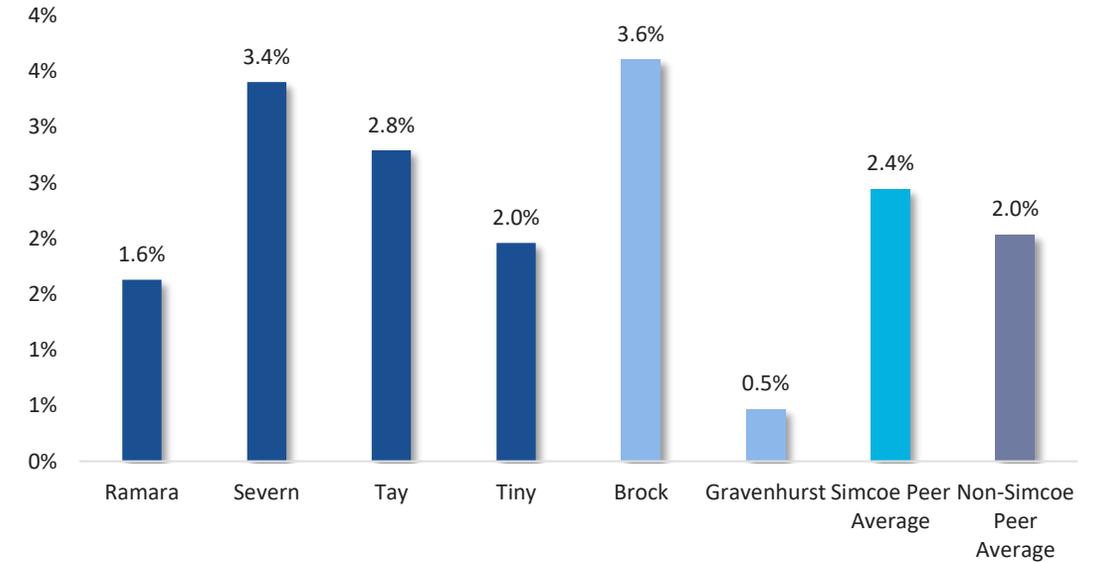
- Though Ramara has fewer fire stations compared to its peers, its population served/firefighter staff suggests that its fire and rescue force is in line with its peers. However, further exploration into response times, call volumes, and mutual aid agreements is required in order to determine if the Township is underserving its population on fire services.
- Additionally, Ramara’s fleet size for fire and rescue services is higher than its peers (where data is available) due to its unique service mix based on its community risk assessment and long shoreline.
- As noted in Recommendation 26 and 27 on Slides 15-16, Ramara should review Fire and Rescue to ensure service offerings and levels meet need, and it should review fleet size and explore ways to either recoup fleet costs through shared service agreements as a revenue generating tool or divest some assets to reflect service need for the Township.

Planning Services Department (2018)

Planning and Development as % of OpEx



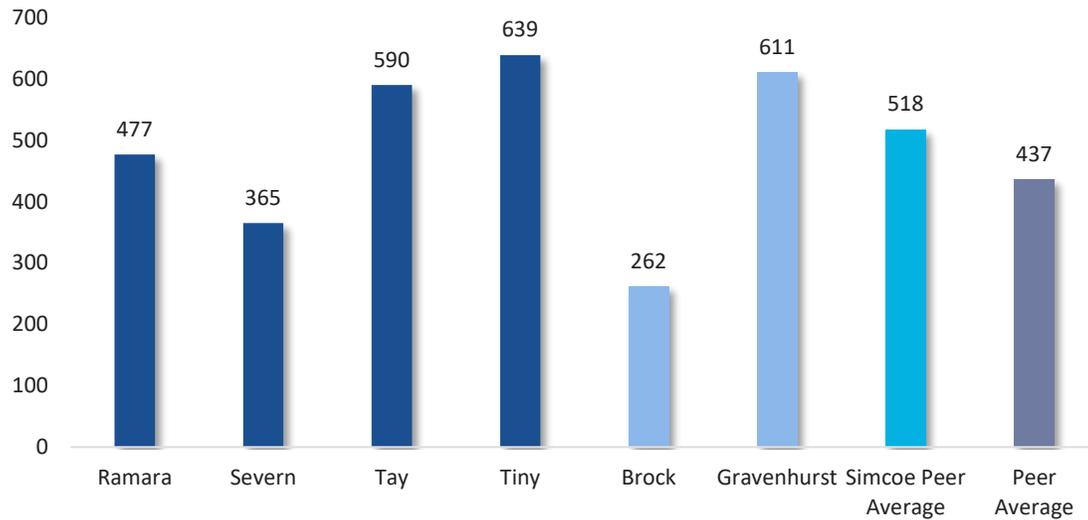
Development Charges as % of Revenue



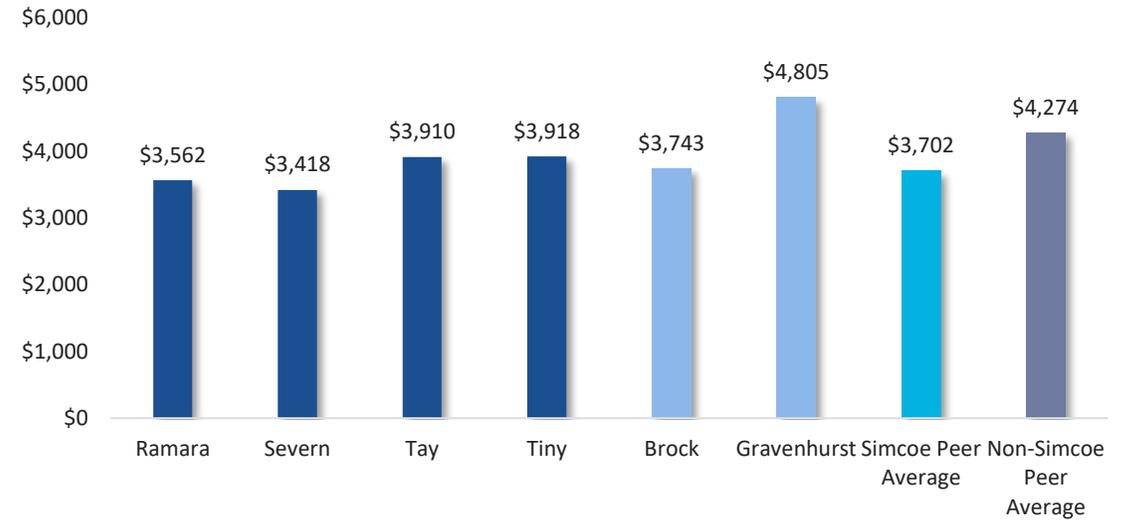
- Ramara is in line with peers on percentage of operating expenses going to Planning and Development, but its revenue from development charges is lower than its peers. Planning may vary due to differences in developable land and market attraction for developable land. Ramara is on the low end for development charges, and, in years prior to 2018, had no development charges. This development charges strategy should be reviewed to determine if low development charges attracted growth. As noted in Recommendation 12 on Slide 11, Ramara should design an economic development strategy aligned with Township goals. As part of this opportunity, it should review its development charge strategy.

Building Services Department (2018)

Number of Building Permits



Permit Value/Capita



Residential and Multi-Res as a % of Total Permits

Entity	Residential and Multi-Res as a % of Total Permits
Ramara	95%
Severn	95%
Tay	98%
Tiny	98%
Brock	64%
Gravenhurst	96%

- Ramara is similar to its Simcoe and non-Simcoe peers with regards to number of building permits issued and permit value. Additionally, its building mix is similar to its peers, except Brock, who has more non-residential development.



Appendix D: Township of Ramara Departmental Profiles

Introduction

StrategyCorp has developed departmental profiles for each of Ramara’s functional departments (see Slide 66) as a way for the Township to have a high-level overview of important service delivery indicators. Each profile consists of two components:

1

Department Profile

- Services offered and identification if services are discretionary or legislated;
- Staff complement;
- Department expenses and revenue five-year trends;
- 2020 expenses and revenues as a percentage of overall Township revenue and expenses;
- Service delivery observations; and
- Potential opportunities.

2

Service Inventory

- Whether services are legislated or discretionary;
- Service customer—internal Township staff, resident, or user;
- Service provider—Municipal Township staff, contractors, and/or volunteers;
- Legislation, bylaws, or policies that set service delivery standards; and
- Ramara’s performance measures.

It should be noted that Ramara’s budget is organized to streamline MMAH’s FIR reporting requirements. As a result, the budget does not reflect functional departments one-to-one. Ramara’s Treasurer supported StrategyCorp in reorganizing Ramara’s budget by functional department. The Executive Services Department, Finance Department, and Legislative and Community Services Department fall under the current “Administration” category in the current budgets, and separating those three functional departments would be a large undertaking. The details on how the current budget was divided to support the functional department assessment is described on each profile. StrategyCorp understands that Ramara is undertaking a process of re-organizing the budget to align FIR reporting with functional department. StrategyCorp affirms this initiative as demonstrated in Recommendation 5 on Slide 9.

Township Services by Department

Legislative & Community Services

Legislative Services

- Records and information Management
- FOI
- Elections
- Council Supports
- Commissioning of Documents
- Secretary to Lagoon City Parks and Waterways Committee
- By-laws
- By-law Enforcement including Outdoor Property Standards
- Accessibility
- Canine/Animal Control
- Livestock Valuers
- Management of Committees
- Facilities Maintenance
- Community Centre Boards
- Crossing Guard

Community Services

- Fence Viewers
- Recreation Services
- Wall of Fame

Libraries

- Library Services

Infrastructure Department

Public Works

- Asset Management
- Noxious Weed Maintenance
- Municipal Drain Maintenance
- Vehicle and Equipment Maintenance
- Roads Maintenance
- Winter Controls
- Parking Lot and Sidewalk Maintenance
- Bridges and Culverts Maintenance
- Driveway Entrance Permits and Inspections
- Signs and Street Lights
- Park Maintenance
- Long Grass Maintenance
- Rural Mailbox Permits
- Mosquito Control
- Flooding Control
- Trail Maintenance
- GIS
- Fleet Management
- Playground Inspection

Environmental Services

- Water Services
- Wastewater Services
- Metering Services

Finance Department

- Tax Services
- Utility Payments
- Township Budget
- Payroll
- Accounts Payable/Receivable
- Customer Services

Fire & Rescue Services

- Fire Suppression
- Public Education
- Fire Prevention
- Fire Investigation
- Emergency Management
- Volunteer Training
- Volunteer Administration
- 911/Dispatch Services
- Hazardous Material Response
- Vehicle Extraction
- Remote Rescue
- Solar Signs
- Medical Response
- Ice and Water Rescue
- Marine Rescue

Executive Services

- Human Resources
- Health & Safety
- Strategic Initiatives
- Corporate Communications
- Economic Development

Planning Services

- Official Plan Amendments
- Zoning Bylaw Amendment
- Site Plan Approvals & Agreements
- Consent Agreements
- Minor Variances
- Validation of Title and Leases Greater than 21 years
- Plan of Subdivision/Condominiums
- Applications pertaining to Aggregate Resources Act applications

Building Services

- Permits
- Inspections
- Property Standards – Inside
- Septic Reinspection Program
- Public Relations and Education

Department Profile

Services Provided

- L Human Resources
- M Health & Safety
- D Strategic Initiatives
- D Corporate Communications
- D Economic Development

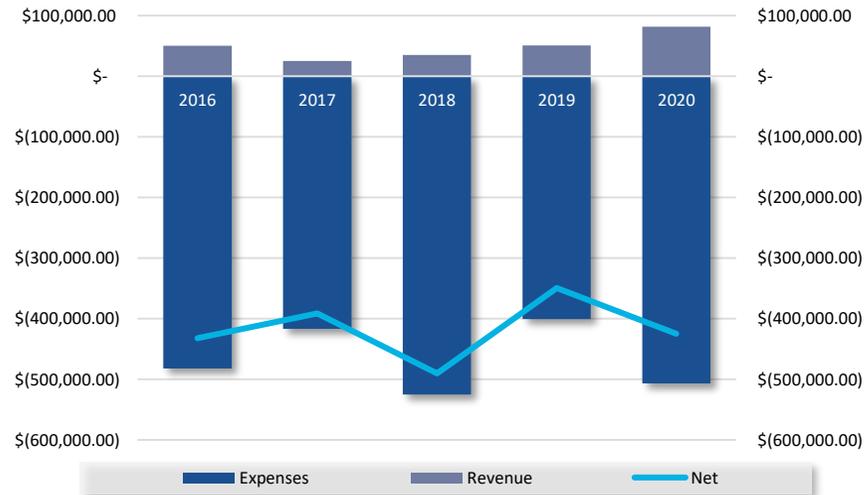
- L Legislated
- D Discretionary
- M Mixed

Staff Complement

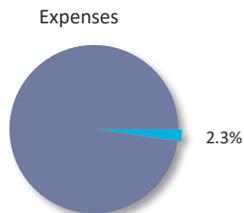
- FT Chief Administration Officer (CAO)
- FT Executive Assistant and Council Liaison
- FT Business and Communications Coordinator
- FT Human Resources Coordinator and Health and Safety Officer

Executive Services

Budget Highlights



% of Dep. Budget as part of all Dep. Budgets (2020)



Budget Observations

- Executive Services does not have a dedicated functional budget line.
- The two main components of the expenses shown here are *salaries* and *economic development*.
- The department's overhead and shared costs (i.e. legal fees) are all housed in the *Admin* budget line, in line with FIR reporting requirements.

Service Delivery Observations

- Executive Services, while mostly discretionary, is critical to the functioning of a healthy municipality. It serves internal staff primarily, though residents benefit from economic development and corporate communication.
- It has a lean staff with high-performers, but the Council Liaison responsibilities should be clarified to ensure there is no overlap with the Clerk and Deputy Clerk roles.
- The department works to meet legislated standards where given, but it lacks key performance indicators and targets to measure performance.

Potential Opportunities

- Develop enterprise-wide KPIs and targets that align with Council goals, legislated service standards where provided, and appropriate service levels.
- Ramara needs an updated HR plan that includes cross-training and succession planning.
- Create an economic development strategy that advances the Township's strategic priorities.
- Explore development of a social media and external communications strategy and oversight plan.

Executive Services

Service Inventory

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Human Resources	Internal	Legislated	Municipal Staff	<p>Detailed in <i>Ramara Human Resources Policies</i>, developed in accordance with:</p> <ul style="list-style-type: none"> • <i>Canadian Human Rights Act</i> • <i>Ontario Human Rights Code</i> • <i>Employment Standards Act</i> • <i>Accessibility for Ontarians with Disabilities Act</i> <p>Directed by:</p> <ul style="list-style-type: none"> • <i>Salaries and Honorariums for Council Bylaw, Salaries and Honorariums for Staff Bylaw</i> • <i>Collective Agreement</i> with Unionized Works department employees 	<i>None available</i>
Health & Safety	Internal	Legislated	Municipal Staff	<p>Detailed in <i>Ramara Health and Safety Policies</i> as directed by:</p> <ul style="list-style-type: none"> • <i>Occupational Health and Safety Act</i> 	<i>None available</i>
Strategic Initiatives	Residents/ Internal	Discretionary	Municipal Staff	<i>None available</i>	<i>None available</i>
Corporate Communications	Residents/ Internal	Discretionary	Municipal Staff	<p>In accordance with</p> <ul style="list-style-type: none"> • <i>Accessibility for Ontarians with Disabilities Act</i> 	<i>None available</i>
Economic Development	Residents/ Internal	Discretionary	Municipal Staff	<p>In accordance with the</p> <ul style="list-style-type: none"> • <i>Planning Act</i> 	<i>None available</i>

Department Profile

Services Provided

- L Tax Services
- L Utility Payments
- L Township Budget
- M Payroll
- D Accounts Payable
- D Customer Services

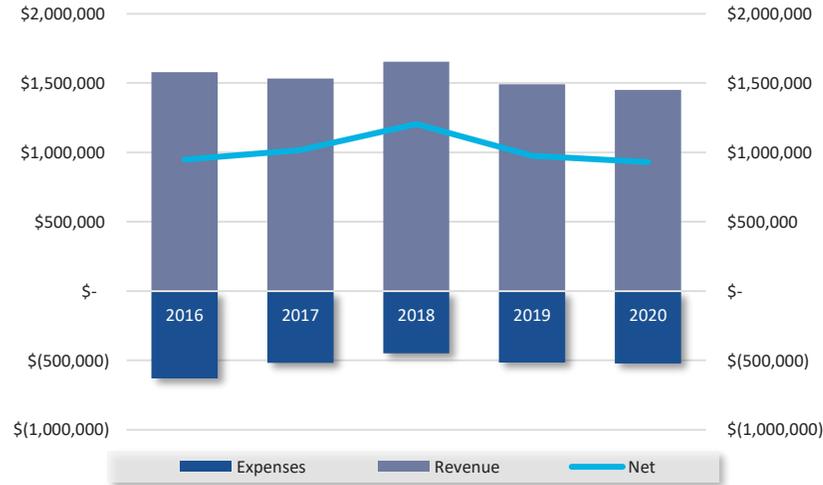
- L Legislated
- D Discretionary
- M Mixed

Staff Complement

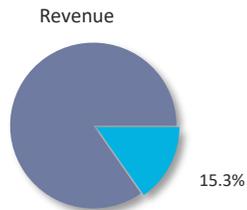
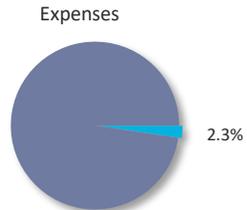
- FT Director of Finance
- FT Tax Inquiry Clerk
- FT Utilities/Accounts Receivable Clerk
- FT Tax Collector/Payroll Clerk
- FT Customer Care/Accounts Payable Clerk
- FT Customer Care Clerk

Finance Department

Budget Highlights



% of Dep. Budget as part of all Dep. Budgets (2020)



Budget Observations

- Finance does not have a dedicated functional budget line.
- The expenses shown here are made up of *salaries*.
- The revenue shown does not include municipal tax revenue.
- The department's overhead and shared costs (i.e. legal fees) are also all housed in the *Admin* budget line, in line with FIR reporting requirements.
- This department's revenue is not used to cover expenses and comes from several rate payer sources that get distributed throughout the organization.

Service Delivery Observations

- Municipalities are required to perform financial management functions and collect taxes. As such, this department is critical to Ramara and serves internal staff and residents.
- This is a lean department that has cross-trained staff to perform customer care roles.
- This department has been leading initiatives to increase collaboration and breakdown silos through tech integration and planning.
- The department is developing KPIs and targets, but it is unclear if they systematically measure performance against them.

Potential Opportunities

- Provide additional online functions to look up tax and utility bills, pay for dog tags, etc. should be explored to improve resident services.
- Increased cross-training within customer care and integration of customer care logging and reporting for all departments. Finance needs to codify its collaborative budgeting process that includes quarterly updates to department heads and Council.
- Organize its budget by functional department and FIR.
- Continue collaboration with Infrastructure on the Asset Management Plan.

Finance Department Service Inventory

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Tax Services	Residents	Legislated	Municipal Staff	As directed by: <ul style="list-style-type: none"> <i>The Municipal Act</i> <i>The Assessment Act</i> 	<ul style="list-style-type: none"> Tax bills sent out 21 days before due Tax certificates sent out within 1 week Calls returned within 24 hour
Utility Payments	Residents	Legislated	Municipal Staff	As directed by: <ul style="list-style-type: none"> <i>The Municipal Act</i> <i>The Clean Water Act</i> 	<ul style="list-style-type: none"> Calls returned within 24 hour
Township Budget	Internal	Legislated	Municipal Staff	As directed by: <ul style="list-style-type: none"> <i>The Municipal Act</i> 	<ul style="list-style-type: none"> Budget balances Budget prepared by established deadlines Good communication with all department heads
Payroll	Internal	Legislated/ Discretionary	Municipal Staff	Detailed in <i>Ramara Human Resources Policies</i> in accordance with: <ul style="list-style-type: none"> <i>The Employment Standards Act</i> 	<ul style="list-style-type: none"> No errors is payroll Payroll completed by cutoff weekly
Accounts Payable/Receivable	Internal	Discretionary	Municipal Staff	In accordance with: <ul style="list-style-type: none"> <i>The Municipal Act</i> 	<ul style="list-style-type: none"> Cheques prepared weekly Payments delivered on time
Customer Services	Users	Discretionary	Municipal Staff	<i>None available</i>	<ul style="list-style-type: none"> Costumer Complaints Problems solve without manager involvement Managers kept informed

Legislative & Community Services

Department Profile

Services Provided

Legislative Services

- L Records and information Management
- L FOI
- L Elections
- L Council Supports
- L Commissioning of Documents
- L Secretary to Lagoon City Parks and Waterways Committee
- L By-laws
- L By-law Enforcement including Outdoor Property Standards
- L Accessibility
- L Canine/Animal Control

- L Livestock Valuers
 - M Management of Committees
 - D Facilities Maintenance
 - D Community Centre Boards
 - D Crossing Guard
- #### Community Services
- L Fence Viewers
 - D Recreation Services
 - D Wall of Fame

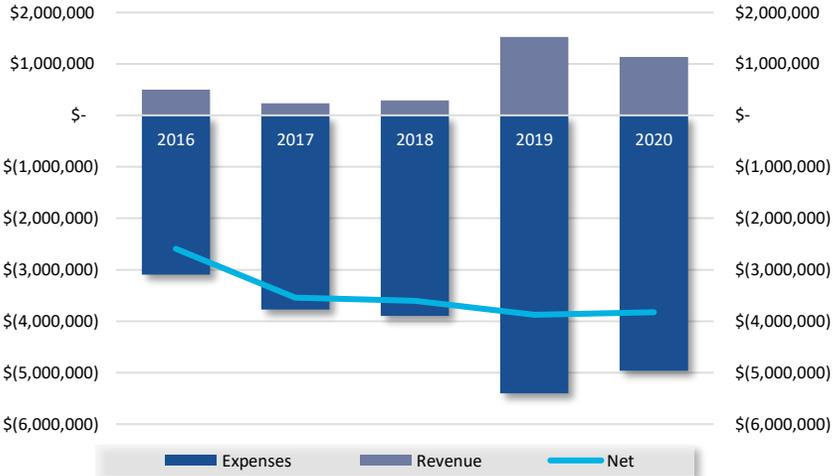
- L Legislated
- D Discretionary
- M Mixed

Staff Complement

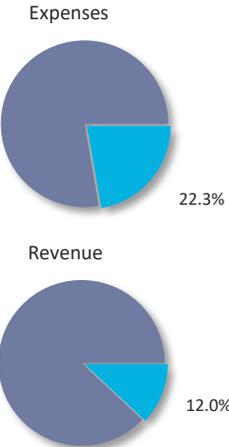
- FT Clerk
- FT Deputy Clerk
- FT Records and Information Coordinator
- FT Bylaw Services Coordinator
- FT Bylaw Enforcement Officer
- PT Bylaw Enforcement Officer
- FT Rec. Services Supervisor
- FT Rec. Youth Programmer
- PT Rec. Program Assistance
- FT Building and Main. Supervisor
- PT Crossing Guard
- C Recreation Service Providers

C Contract Employee

Budget Highlights



% of Dep. Budget as part of all Dep. Budgets (2020)



Budget Observations

- Legislative and Community Services is the second largest department by expenditure.
- This department's expenses includes the overhead and shared costs (i.e. legal fees) for Finance and Executive Services.
- This department also does not have a dedicated budget line, but includes *Rec, Bylaw, Community Policing, the Medical Centre, the Community Boards, and a large portion of the Admin lines.*
- This departments added a Bylaw supervisor position in 2019.

Service Delivery Observations

- Most services in this department are legislated to support critical democratic functions and are resident-facing and, therefore, under higher public scrutiny.
- While the staff is fairly lean, they rely on contractors and volunteers to deliver both legislative and community services.
- The department works to meet legislated standards where provided (legislative services) but lacks key performance indicators and targets to ensure continual improvement.
- Recreation Services cannot meet demand and may be underservicing the community.

Potential Opportunities

- Ramara needs a renewed vision for recreation services that aligns community need with Township's AMP. As part of this, it should consider a reorganization and explore duplication in programming between Rec and Libraries and what is driving that duplication.
- Ramara should explore offering more services through community centres, like payments for utilities, dog tags, etc.
- Ramara should implement an online bylaw portal and bylaw complaint feature.

Legislative Services

Service Inventory (1/2)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Records and information Management	Residents & Internal	Legislated	Municipal Staff	Detailed in <i>Records Retention Bylaw (2004)</i> in accordance with <ul style="list-style-type: none"> <i>TOMRMS (The Ontario Municipal Records Management System)</i> 	<i>None available</i>
FOI	Residents & Users	Legislated	Municipal Staff	As directed by: <ul style="list-style-type: none"> <i>Municipal Freedom of Information & Protection to Privacy Act</i> 	<ul style="list-style-type: none"> Respond to requests in 30 days
Elections	Residents & Internal	Legislated	Municipal Staff & Volunteers	As directed by: <ul style="list-style-type: none"> <i>Municipal Election Act</i> 	<i>None available</i>
Council Supports	Internal	Legislated	Municipal Staff	Detailed in the <i>Township Procedure Bylaw</i> in accordance with: <ul style="list-style-type: none"> <i>Code of Conduct</i> <i>Conflict of Interest Act</i> As directed by: <ul style="list-style-type: none"> <i>Ontario Municipal Act</i> 	<i>None available</i>
Commissioning of Documents	Residents & Internal	Legislated	Municipal Staff	As directed by: <ul style="list-style-type: none"> <i>Commissioners for taking Affidavits Act</i> 	<i>None available</i>
Secretary to Lagoon City Parks and Waterways Committee	Residents & Internal	Legislated	Municipal Staff	In accordance with: <ul style="list-style-type: none"> <i>Township of Mara Act, 1986</i> <i>Municipal Act</i> 	<i>None available</i>
Bylaws	Residents & Internal	Legislated	Municipal Staff & Contractors	In accordance with: <ul style="list-style-type: none"> <i>Municipal Act</i> 	<i>(Various timelines)</i>

Legislative Services

Service Inventory (2/2)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Bylaw Enforcement <i>including Outdoor Property Standards</i>	Residents & Internal	Legislated	Municipal Staff & Contractors	As directed by: <ul style="list-style-type: none"> Several Township Bylaws <i>Ontario Building Code</i> In accordance with: <ul style="list-style-type: none"> <i>Municipal Act</i> 	<i>In Development</i>
Accessibility	Residents	Legislated	Municipal Staff	As directed by: <ul style="list-style-type: none"> <i>Ontarians with Disabilities Act</i> 	<i>None available</i>
Animal Control	Residents	Legislated	Municipal Staff	Detailed in the <i>Canine Control Bylaw</i> as directed by: <ul style="list-style-type: none"> <i>Dog Owner's Liability Act</i> <i>Municipal Act</i> 	<i>None available</i>
Livestock Valuers	Residents	Legislated	Municipal Staff	As directed by: <ul style="list-style-type: none"> <i>Livestock, Poultry & Honey Bee Act</i> 	<ul style="list-style-type: none"> Payments made within 30 days
Management of Committees	Residents & Internal	Legislated & Discretionary	Municipal Staff	In accordance with: <ul style="list-style-type: none"> <i>Codes of Conduct – Council, Committees, and Boards</i> as directed by: <ul style="list-style-type: none"> <i>The Municipal Act</i> 	<i>None available</i>
Facilities Maintenance	Residents & Internal	Discretionary	Municipal Staff	In accordance with <ul style="list-style-type: none"> <i>Building Code Act</i> 	<i>None available</i>
Committee Centre Boards	Residents & Internal	Discretionary	Municipal Staff	Detailed in the <i>Community Centre Boards of Management Bylaw</i>	<i>None available</i>
Crossing Guard	Residents	Discretionary	Contractor	In accordance with the <i>Ontario Highway Traffic Act</i>	<i>None available</i>

Community Services

Service Inventory

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Fence Viewers	Residents	Legislated	Municipal Staff	As directed by <i>Ontario Line Fences Act</i>	<i>None available</i>
Recreation Services	Residents	Discretionary	Municipal Staff & Contractors	<i>None available</i>	<i>None available</i>
Wall of Fame	Residents	Discretionary	Municipal Staff & Volunteers	<i>None available</i>	<i>None available</i>

Department Profile

Services Provided

Public Works

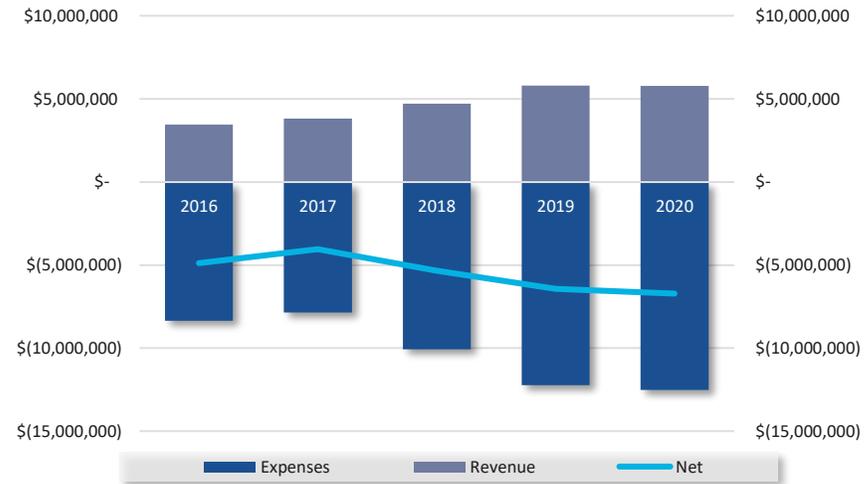
L Asset Management	D Park Maintenance
L Noxious Weed Maintenance	D Long Grass Maintenance
L Municipal Drain Maintenance	D Rural Mailbox Permits
L Fleet Management	D Mosquito Control
M Vehicle and Equipment Maintenance	D Flooding Control
D Roads Maintenance	D Trail Maintenance
D Winter Controls	D GIS
D Parking Lot and Sidewalk Maintenance	D Playground Inspection
D Bridges and Culverts Maintenance	Environmental Services
D Driveway Entrance Permits and Inspections	L Water Services
D Signs and Street Lights	L Wastewater Services
	D Metering Services
	L Legislated
	D Discretionary
	M Mixed

Staff Complement

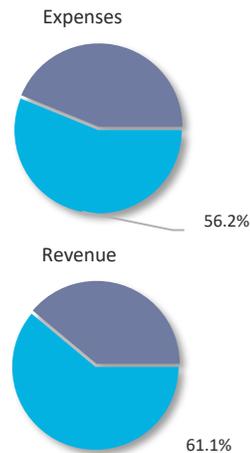
FT Director of Infrastructure	FT 8 Heavy Equipment Operators
FT Deputy Manager of Infrastructure	FT 3 Labourers
FT Foreperson	C Seasonal Support
FT Administrative Assistant	C Summer Students
FT GIS/Asset Management Coordinator	Environmental Services staff compliment not provided
FT Mechanic	
FT Apprentice Mechanic	C Contract Employee

Infrastructure Department

Budget Highlights



% of Dep. Budget as part of all Dep. Budgets (2020)



Budget Observations

- Infrastructure is by far the largest department by expenditure.
- The Infrastructure Department budget is made up of the *Roads, Environmental, and Trails* (found in *Rec*) budget lines.
- This department has begun the process of organizing their budget by service function, which is necessary for finding efficiencies in service delivery.
- Within the *Roads* budget, *salaries* make up the largest operating expense by almost double the next highest costs for *materials* and *contracted services*.

Service Delivery Observations

- Many of the public works are not legislated but have regulated minimum service standards for liability protection.
- Nearly all services in this department are resident-facing and, therefore, are under higher public scrutiny.
- Public Works has a fairly lean staff given that it spent over \$1.2M on contracted services in 2019, compared to nearly \$2M on staff salaries and wages.
- Ramara has set standards for many services (regulated and policy) but lacks tracking and performance data on its service delivery. Staff and Council noted they receive complaints on roads despite internal satisfaction with service delivery.
- Ramara is working to operationalize its AMP process. This needs to continue to include a baseline understanding of standards, costs, and services levels before robust planning can occur.

Potential Opportunities

- Ramara should review its contracted services and implement contract management policies to ensure value for money.
- Investigate work order process to better track and evaluate service delivery.

Infrastructure Department – Public Works

Service Inventory (1/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Asset Management	Residents & Internal	Legislated	Municipal Staff	Detailed in <i>Ramara Assets Management Planning Policy</i> As directed by: <ul style="list-style-type: none"> • <i>Asset Management Planning for Municipal Infrastructure Regulation</i> 	<i>None Available</i>
Noxious Weed Maintenance	Residents	Legislated	Municipal Staff & Contractors	As directed by <i>the Weed Act</i>	<i>None Available</i>
Municipal Drain Maintenance	Residents	Legislated	Municipal Staff & Contractors	As directed by <i>the Drainage Act</i>	<i>None Available</i>
Fleet Management	Internal	Legislated	Municipal Staff	In accordance with: <ul style="list-style-type: none"> • <i>NFPA Standards</i> as directed by: <ul style="list-style-type: none"> • <i>OHSA, 1990</i> • <i>Highway Traffic Act</i> 	<i>None Available</i>
Vehicle and Equipment Maintenance	Internal	Legislated & Discretionary	Municipal Staff & Contractors	In accordance with: <ul style="list-style-type: none"> • <i>Ontario Health & Safety Act</i> • <i>Highway Traffic Act</i> 	<i>None Available</i>
Roads Maintenance	Users	Discretionary*	Municipal Staff & Contractors	In accordance with <ul style="list-style-type: none"> • <i>Minimum Maintenance Standards for Municipal Highways Regulation</i> 	<i>None Available</i>
Winter Controls	Users	Discretionary*	Municipal Staff & Contractors	Detailed in <i>Ramara Winter Control Policy</i> In accordance with <ul style="list-style-type: none"> • <i>Minimum Maintenance Standards for Municipal Highways Regulation</i> 	<i>None Available</i>

* Minimum regulated standards for liability protection

Infrastructure Department – Public Works

Service Inventory (2/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Parking Lot and Sidewalk Maintenance	Users	Discretionary*	Municipal Staff & Contractors	Detailed in <i>Ramara Winter Control Policy</i> In accordance with <ul style="list-style-type: none"> <i>Minimum Maintenance Standards for Municipal Highways Regulation</i> 	<i>None Available</i>
Bridges and Culverts Maintenance	Users	Discretionary*	Municipal Staff & Contractors	Detailed in <i>Ramara Winter Control Policy</i> In accordance with <ul style="list-style-type: none"> <i>Minimum Maintenance Standards for Municipal Highways Regulation</i> 	<i>None Available</i>
Driveway Entrance Permits and Inspections	Residents	Discretionary	Municipal Staff	As directed <i>Ramara Driveway Entrance Bylaw</i>	<i>None Available</i>
Signs and Street Lights	Users	Discretionary*	Municipal Staff & Contractors	In accordance with <ul style="list-style-type: none"> <i>Minimum Maintenance Standards for Municipal Highways Regulation</i> <i>Manual of Uniform Traffic Control Devices for Canada</i> 	<i>None Available</i>
Park Maintenance	Users	Discretionary	Municipal Staff & Contractors	<i>None Available</i>	<i>None Available</i>
Long Grass Maintenance	Residents	Discretionary	Contractors	As directed <i>Ramara Long Grass Bylaws</i>	<i>None Available</i>
Rural Mailbox Permits	Residents	Discretionary	Municipal Staff	Detailed in <i>Ramara Mailbox Replacement Policy</i> As directed by: <ul style="list-style-type: none"> <i>Ramara Mailbox Bylaws</i> 	<i>None Available</i> * Minimum regulated standards for liability protection

Infrastructure Department – Public Works

Service Inventory (3/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Mosquito Control	Residents	Discretionary	Contractors	In accordance with: <ul style="list-style-type: none"> Pest Control Products Act 	<i>None Available</i>
Flooding Control	Users	Discretionary*	Municipal Staff & Contractors	In accordance with <ul style="list-style-type: none"> <i>Minimum Maintenance Standards for Municipal Highways Regulation</i> 	<i>None Available</i>
Trail Maintenance	Users	Discretionary	Municipal Staff, Contractors & Volunteers	<i>None Available</i>	<i>None Available</i>
GIS	Internal & Users	Discretionary	Municipal Staff	<i>None Available</i>	<i>None Available</i>
Playground Inspection	Residents	Discretionary	N/A	<i>N/A</i>	<i>N/A</i>

* Minimum regulated standards for liability protection

Infrastructure Department – Environmental Services

Service Inventory

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Water Services	Residents	Legislated	TBD (Contractors)	As directed by: <ul style="list-style-type: none"> <i>Sewer and Water Works Connection Bylaw</i> In accordance with: <ul style="list-style-type: none"> <i>Ontario Drinking Water Quality Standards</i> <i>Environmental Protection Act</i> <i>Ontario Water Resources Act</i> <i>Planning Act</i> 	<i>None Available</i>
Wastewater Services	Residents	Legislated	TBD (Contractors)	As directed by: <ul style="list-style-type: none"> <i>Sewer and Water Works Connection Bylaw</i> In accordance with: <ul style="list-style-type: none"> <i>Environmental Protection Act</i> <i>Ontario Water Resources Act</i> <i>Planning Act</i> 	<i>None Available</i>
Metering Services	Residents	Discretionary	Municipal Staff	In accordance with <i>Ramara Water Meter Installation Bylaw</i>	<i>None Available</i>

Department Profile

Services Provided

- L Permits
- L Inspections
- L Property Standards (Inside)
- M Septic Reinspection Program
- D Public Relations & Education

- L Legislated
- D Discretionary
- M Mixed

Staff Complement

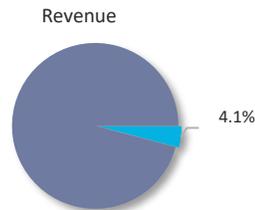
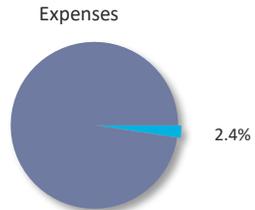
- FT Chief Building Officer (Retiring June)
- FT Deputy Chief Building Official
- FT Building Inspector/ Property Standards Officer
- FT Septic Re-Inspection Coordinator/ Building Inspector

Building Department

Budget Highlights



% of Dep. Budget as part of all Dep. Budgets (2020)



Budget Observations

- Buildings is one of the smaller department in terms of budget with its largest cost being salaries.
- This department is partially organized by service function with septic reinspection broken out.
- Otherwise the department's budget is organized into fleet costs and general expenses which includes remaining salaries, materials, and contracted service (i.e. legal fees).
- In the last 2 years this department's budget have been netting negative.

Service Delivery Observations

- This is a small department offering primarily legislated services with set delivery standards.
- The department also recently took septic reinspection services in house, following Council expansion of the program.
- This department has strong (soon to be formalized) customer service standards that have been identified as best practice within the Township.
- With the retirement of the Chief Building Officer, vacant building inspector role, and backlog of 2,500 outstanding permits, this department needs to determine how it will fill its capacity gaps.

Potential Opportunities

- Explore combining building and planning departments to facilitate further streamlining and continued collaboration through cross-training and explore options for hiring cross trained inspector for buildings and fire prevention.
- Improve digital service delivery for permits, approvals etc. as well as online application and payment options.

Building Department Service Inventory

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Permits	Residents	Legislated	Municipal Staff	As directed by the <i>Ontario Building Code Act and Regulations</i>	<ul style="list-style-type: none"> Homes -10 Working Days Small Buildings – 15 Working Days Large Buildings – 20 Working Days
Inspections	Residents	Legislated	Municipal Staff	As directed by the <i>Ontario Building Code Act and Regulations</i>	<ul style="list-style-type: none"> Must be carried out no later than 2 days from when requested
Property Standards (Indoor)	Residents	Legislated	Municipal Staff	As directed by the <i>Ontario Building Code Act and Regulations</i>	<ul style="list-style-type: none"> Depending on severity however most are carried out upon receipt of complaint
Septic Reinspection Program	Residents	Legislated & Discretionary	Municipal Staff	As directed by: <ul style="list-style-type: none"> <i>Discretionary Septic Re-inspection Bylaw</i> <i>Ontario Building Code Act and Regulations</i> 	<ul style="list-style-type: none"> Predetermined 5 year cycle to complete 650 inspections per year and associated follow up and record keeping administration
Public Relations & Education	Residents	Discretionary	Municipal Staff	Informal customer service protocol	<ul style="list-style-type: none"> Provide courteous, professional, respectful and informative assistance to the public and other outside agencies

Department Profile

Services Provided

- L Official Plan Amendments
- L Zoning Bylaw Amendment
- L Site Plan Approvals & Agreements
- L Consent Agreements
- L Minor Variances
- L Validation of Title and Leases Greater than 21 years
- L Plan of Subdivision/Condominiums
- L Applications pertaining to Aggregate Resources Act applications

- L Legislated
- D Discretionary
- M Mixed

Staff Complement

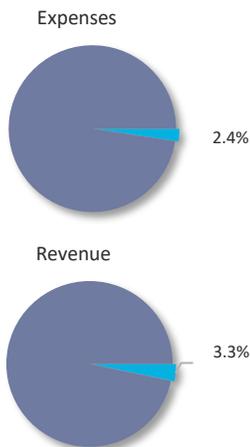
- FT Planning Supervisor/Zoning Administrator
- FT Planning Technician

Planning Department

Budget Highlights



% of Dep. Budget as part of all Dep. Budgets (2020)



Budget Observations

- Planning is also one of the smaller departments with its own budget line.
- The department's budget is organized by *operating* and *capital* expenses.
- Within its operating budget, planning spends marginally more on *contracted services* and *third-party fees* than it does *salaries*.

Service Delivery Observations

- The Planning Department provides critical legislated services.
- The department is small and relies heavily on contracted services, in line with other similar municipalities and the intermittent nature of many planning services.
- Staff identified strong collaboration with the building department.

Potential Opportunities

- Explore combining building and planning departments to facilitate further streamlining and continued collaboration through cross-training.
- Implement more technology and software to enable more digital and online service delivery.
- Shift to a more proactive long-term process to allow Official Plan to reflect Township priorities as opposed to year-to-year demand.

Planning Department

Service Inventory (1/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Official Plan Amendments	Residents	Legislated	Contractors	<p>Detailed in the <i>Township of Ramara Official Plan</i> In accordance with:</p> <ul style="list-style-type: none"> • <i>Township of Ramara Zoning Bylaw</i> • <i>County of Simcoe Official Plan</i> • <i>Clean Water Act</i> • <i>Lake Simcoe Protection Act</i> <p>As directed by:</p> <ul style="list-style-type: none"> • <i>Planning Act</i> 	<ul style="list-style-type: none"> • Completed within 3-4 months
Zoning Bylaw Amendment	Residents	Legislated	Municipal Staff & Contractors	<p>In accordance with:</p> <ul style="list-style-type: none"> • <i>Township of Ramara Official Plan</i> • <i>Township of Ramara Zoning Bylaw</i> • <i>County of Simcoe Official Plan</i> <p>As directed by:</p> <ul style="list-style-type: none"> • <i>Planning Act</i> 	<ul style="list-style-type: none"> • Completed within 2-4 months
Site Plan Approvals & Agreements	Residents	Legislated	Municipal Staff & Contractors	<p>Detailed in the <i>Ramara Site Plan Control Bylaw</i> In accordance with:</p> <ul style="list-style-type: none"> • <i>Township of Ramara Official Plan</i> • <i>County of Simcoe Official Plan</i> • <i>Township of Ramara Zoning Bylaw</i> • <i>Clean Water Act</i> • <i>Lake Simcoe Protection Act</i> <p>As directed by:</p> <ul style="list-style-type: none"> • <i>Planning Act</i> 	<ul style="list-style-type: none"> • Pre-Permit Approvals - 1-2 days • Residential Approvals – 5-10 days • Commercial Site Plan Approvals - 10-20 days

Planning Department

Service Inventory (2/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Consent Agreements	Residents	Legislated	Municipal Staff & Contractors	In accordance with: <ul style="list-style-type: none"> Township of Ramara Official Plan County of Simcoe Official Plan Township of Ramara Zoning Bylaw Clean Water Act Lake Simcoe Protection Act As directed by: <ul style="list-style-type: none"> Planning Act 	<ul style="list-style-type: none"> Completed within 1 year
Minor Variances	Residents	Legislated	Municipal Staff	In accordance with: <ul style="list-style-type: none"> Township of Ramara Zoning Bylaw Clean Water Act Lake Simcoe Protection Act As directed by: <ul style="list-style-type: none"> Planning Act 	<ul style="list-style-type: none"> Completed within 2 months
Validation of Title and Leases Greater than 21 years	Residents	Legislated	Municipal Staff	As directed by: <ul style="list-style-type: none"> Planning Act 	<ul style="list-style-type: none"> Completed within 2 months
Plan of Subdivision/ Condominiums	Residents	Legislated	Contractors	In accordance with: <ul style="list-style-type: none"> Township of Ramara Official Plan County of Simcoe Official Plan Township of Ramara Zoning Bylaw Clean Water Act Lake Simcoe Protection Act As directed by: <ul style="list-style-type: none"> Planning Act 	<ul style="list-style-type: none"> Completed within 3-4 months

Planning Department

Service Inventory (3/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
<p>Applications pertaining to Aggregate Resources Act applications</p>	<p>Residents</p>	<p>Legislated</p>	<p>Contractors</p>	<p>In accordance with:</p> <ul style="list-style-type: none"> • <i>Aggregate Resources Act</i> • <i>Township of Ramara Official Plan</i> • <i>County of Simcoe Official Plan</i> • <i>Township of Ramara Zoning Bylaw</i> • <i>Clean Water Act</i> • <i>Lake Simcoe Protection Act</i> <p>As directed by:</p> <ul style="list-style-type: none"> • <i>Planning Act</i> 	<p>Completed within 3-4 months</p>

Department Profile

Services Provided

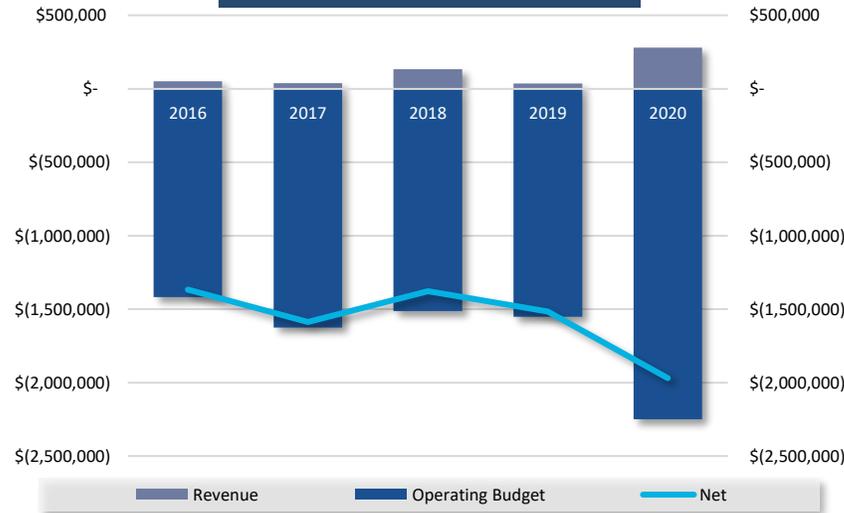
- L Fire Suppression
- L Public Education
- L Fire Prevention
- L Fire Investigation
- L Emergency Management
- L Volunteer Training
- L Volunteer Administration
- L 911/Dispatch Services
- D Hazardous Material Response
- D Vehicle Extraction
- D Remote Rescue
- D Solar Signs
- D Medical Response
- D Ice and Water Rescue
- D Marine Rescue
- L Legislated
- D Discretionary
- M Mixed

Staff Complement

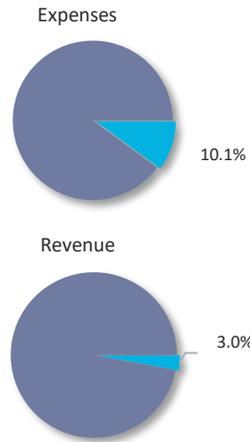
- FT Fire Chief
- FT Deputy Chief
- PT Administrative Assistant
- V 3 District Chiefs
- V 3 Training Officers
- V 6 Captains
- V 6 Lieutenant
- V 55 Suppression Staff
- V Volunteer

Fire & Rescue Services

Budget Highlights



% of Dep. Budget as part of all Dep. Budgets (2020)



Budget Observations

- Fire & Rescue is the third largest department by expenditure.
- The department's budget is a hybrid between functional and operational expense breakdowns.
- The largest expenses for this department are *administration* (which includes full time salaries, materials, supplies etc. as well as the dispatch contract), the *volunteer force*, and *capital expenses* (mostly specialty equipment and vehicles).

Service Delivery Observations

- While many of the department's services are mandated by provincial legislation, many service levels are at the discretion of the Township following provincial guidelines. It has formal and mostly regulated operating standards and guidelines.
- The department's staffing levels are in line with peer municipalities, and staff and Council note that residents speak highly of this department's customer service.
- Standard performance measures for many services exist (e.g. response time, volunteer response rate), but are not being effectively tracked due to technological insufficiency.

Potential Opportunities

- Ramara should review mutual aid agreements to ensure compensation reflects costs, they are collecting appropriately, and preventing scope creep.
- Ramara should review fleet size and either charge for fleet use or divest/not replace.
- Opportunity to evaluate Township's service offerings and service levels.
- Ramara invest in technology for digital inspections, reports, training logs, performance tracking etc.

Fire & Rescue Services

Service Inventory (1/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Fire Suppression	Residents	Legislated	Municipal Staff & Volunteers	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i> in accordance with: <ul style="list-style-type: none"> • <i>PFSG 04-08-10 Operational Planning: An Official Guide to Matching Resource Deployment and Risk</i> as directed by: <ul style="list-style-type: none"> • <i>Fire and Rescue Services Establishing and Regulating Bylaw</i> 	<i>None Available</i>
Public Education	Residents	Legislated	Municipal Staff	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i> in accordance with: <ul style="list-style-type: none"> • <i>Comprehensive Fire Safety Effectiveness Model (OFM) & PFSG 00-000-01 Framework for Setting Guidelines within a Provincial-municipal Relationship,</i> as directed by: <ul style="list-style-type: none"> • <i>the Fire Protection and Prevention Act, 1997 (FPPA)</i> 	<i>None Available</i>
Fire Prevention	Residents	Legislated	Municipal Staff	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i> in accordance with: <ul style="list-style-type: none"> • <i>Comprehensive Fire Safety Effectiveness Model (OFM) & PFSG 00-000-01,</i> as directed by: <ul style="list-style-type: none"> • <i>FPPA, 1997</i> 	<i>None Available</i>
Fire Investigation	Residents & Internal	Legislated	Municipal Staff	Detailed and directed by <i>FPPA, 1997</i>	<i>None Available</i>
Emergency Management	Internal	Legislated	Municipal Staff & Volunteers	Detailed in <i>Emergency Response Plan</i> As directed by: <ul style="list-style-type: none"> • <i>Emergency Management and Civil Protection Act.</i> 	<i>None Available</i>

Fire & Rescue Services

Service Inventory (2/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Volunteer Training	Internal	Legislated	Municipal Staff & Volunteers	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i> in accordance with: <ul style="list-style-type: none"> • <i>NFPA & CBRNE Standards,</i> • <i>Occupational Health and Safety Act, R.S.O 1990 (OHSA);</i> 	<i>None Available</i>
Volunteer Administration	Internal	Legislated	Municipal Staff	As directed by <i>OHSA, 1990</i>	<i>None Available</i>
911/Dispatch Services	Residents & Internal	Legislated	Contracted to City of Orillia	In accordance with: <ul style="list-style-type: none"> • <i>Comprehensive Fire Safety Effectiveness Model (OFM) & PFSG 00-000-01,</i> • <i>FPPA, 1997</i> 	<i>None Available</i>
Fleet Maintenance	Internal	Legislated	Municipal Staff	In accordance with: <ul style="list-style-type: none"> • <i>NFPA Standards</i> • <i>OHSA, 1990</i> • <i>Highway Traffic Act</i> 	<i>None Available</i>
Hazardous Material Response	Residents	Discretionary	Municipal Staff & Volunteers	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i> in accordance with: <ul style="list-style-type: none"> • <i>Authorize Agreement Hazmat Response (Stepan Canada Inc.) bylaw (2002.93) – ended 2012</i> 	<i>None Available</i>
Vehicle Extraction	Residents	Discretionary	Municipal Staff & Volunteers	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i>	<i>None Available</i>
Remote Rescue	Residents	Discretionary	Municipal Staff & Volunteers	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i>	<i>None Available</i>

Fire & Rescue Services

Service Inventory (3/3)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Solar Signs Installation	Residents	Discretionary	Municipal Staff	<i>None Available</i>	<i>None Available</i>
Medical Response	Residents	Discretionary	Municipal Staff & Volunteers	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i> , developed in accordance with <i>County of Simcoe Paramedic Services – PAD Annual Service Agreement</i>	<i>None Available</i>
Ice & Water Rescue	Residents	Discretionary	Municipal Staff & Volunteers	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i>	<i>None Available</i>
Marine Rescue	Residents	Discretionary	Municipal Staff & Volunteers	Detailed in <i>Ramara Fire and Rescue Service O.G.'s and Policies</i>	<i>None Available</i>

Department Profile

Services Provided

- L InterLibrary Loans
- L All Material Loans
- L Collection Development
- L Administration
- L Health & Safety
- D Programming
- D Customer Service
- D Marketing/Promotion
- D Friends of the Library
- D Ramara Library Quilting Club
- D Volunteers (Library Board & in-house)
- D Partnerships

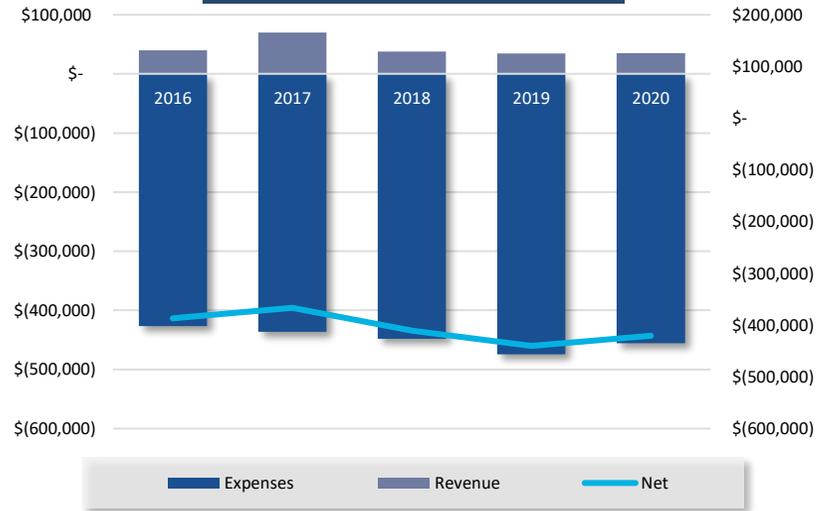
- L Legislated
- D Discretionary
- M Mixed

Staff Complement

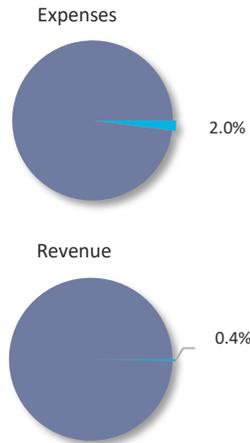
- FT Chief Executive Officer
- FT Libraries Assistant
- PT InterLibrary Loans Coordinator
- PT eServices and Child/Youth Librarian
- PT Library Page
- PT Casual Library Clerk

Libraries

Budget Highlights



% of Dep. Budget as part of all Dep. Budgets (2020)



Budget Observations

- The Libraries budget is determined by Council, but operations are left to an independent board as legislated.
- Just over half of the budget goes to the largest cost of *salaries*.
- The second largest cost is *building rent* for the facilities in Brechin.

Service Delivery Observations

- The library's space is prevented from growing programming and is not supported to becoming a community hub with innovative programming.

Potential Opportunities

- Township needs to work with the Library Board and decide if it is going to support the library's strategic goals and how to support facility improvement.

Libraries

Service Inventory (1/2)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
InterLibrary Loans	Residents	Legislated	Library Staff	In accordance with <i>Public Libraries Act</i>	<ul style="list-style-type: none"> incoming and outgoing shipments
Material Loans	Residents	Legislated	Library Staff	As directed by <i>Public Libraries Act</i>	<ul style="list-style-type: none"> Number of items borrowed
Collection Development	Residents	Legislated	Library Staff	In accordance with: <ul style="list-style-type: none"> <i>Ramara Libraries Collection Policy</i> As directed by: <ul style="list-style-type: none"> <i>Public Libraries Act</i> 	<ul style="list-style-type: none"> Number of items purchased per genre
Administration (including HR, budget/finance, day-day-operations, meetings, governance, policies, facility management,, strategic plan)	Internal	Legislated	Library Staff	As directed by <i>Public Libraries Act</i>	<ul style="list-style-type: none"> Monthly Reports Annual Reports CEO/ Strategic Goals are met
Health & Safety	Internal	Legislated	Library Staff	As directed by <i>Occupational Health and Safety Act</i>	<ul style="list-style-type: none"> Regular audits
Customer Service (including memberships, technical assistance, research assistance etc.)	Residents	Discretionary	Library Staff	Detailed in Various Library Policies	<ul style="list-style-type: none"> Number of patrons and new patrons
Programming	Residents	Discretionary	Library Staff	<i>None Available</i>	<ul style="list-style-type: none"> Program Evaluations

Libraries

Service Inventory (2/2)

Service	Customer	Type	Provider	Service Delivery Standards	Performance Measures
Marketing & Promotion	Residents	Discretionary	Library Staff	None Available	None Available
Friends of the Library	Residents	Discretionary	Volunteers	None Available	<ul style="list-style-type: none"> Funds raised & awarded to library upon request for “extras”
Ramara Library Quilting Club	Residents	Discretionary	Volunteers	None Available	<ul style="list-style-type: none"> Funds raised & awarded to library upon request for “extras”
Volunteer Management (Library Board & In-house)	Internal	Discretionary	Library Staff	In accordance with: <ul style="list-style-type: none"> Ramara Library Volunteer Policy Library Board Bylaw 	<ul style="list-style-type: none"> Annual strategic goals are met
Partnerships	Residents	Discretionary	Library Staff	None Available	<ul style="list-style-type: none"> Partnership goals/agreements are achieved/met



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