

# SERVICE DELIVERY REVIEW

## LOYALIST TOWNSHIP



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# INTRODUCTION

## Purpose of Service Delivery Review

Since the January 1, 1998 amalgamation of the former Amherst Island Township, Ernestown Township and the Village of Bath, Loyalist Township has experienced significant changes, successes and challenges in terms of both administration and service delivery to meet a growing population and shifting resident expectations. Township Council and staff have determined that there is a need to conduct a comprehensive, corporate-wide review of the delivery of services and the management processes of the organization. Such a review would identify potential opportunities for improvement or enhancement in the delivery to ensure (1) that they are being delivered in the most effective and efficient manner, (2) they are aligned with population and business needs and (3) they are aligned with the Township Strategic Plan.

Maclaren Municipal Consulting Inc. was engaged to undertake the Service Delivery Review for Loyalist Township.

## Methodology

The approach undertaken to complete the Service Delivery Review is summarized below:

### 1. Collection and Review of Background Plans and Policies.

Some of the key documents that were incorporated into the Service Delivery Review included:

- Loyalist Township Strategic Plan 2019-2023
- Loyalist Township 2019 Operating and Capital Budget
- Loyalist Township Parks and Recreation Master Plan (2017)
- Ontario Ministry of Municipal Affairs & Housing documentation on modernization funding project for small and rural municipalities
- Loyalist Population, Housing and Employment Projections to 2046 (2019)
- Loyalist Township Economic Development Growth Strategy: 2015-2019 (2014)

### 2. Identification of Service Delivery Areas.

Using the recent organizational chart, Service Delivery Areas were delineated. These areas are the functional working units with specific, identifiable tasks or responsibilities within each Department. The following table shows the Service Delivery Areas.

Table 1 Service Delivery Areas

<b>Department/Division</b>	<b>Service Delivery Area</b>	<b>Lead Staff Position</b>
<b>Economic Growth and Community Development Services</b>		
<b>Development Services</b>	Building Services	Chief Building Official, Building Division
<b>Engineering</b>	Engineering Services	Engineering Manager
<b>Utilities</b>	Utilities	Utilities Manager
<b>Development Services</b>	GIS	Manager of Development Services
<b>Development Services</b>	Planning	Manager of Development Services
<b>Community and Customer Services</b>		
Public Works	Facilities	Public Works & Facilities Manager
Public Works	Ferry Services	Public Works & Facilities Manager
Public Works	Fleet Management	Public Works & Facilities Manager
Public Works	Parks, Sport Fields and Horticulture Management	Public Works & Facilities Manager
Public Works	Roads Operations (excluding winter control)	Public Works & Facilities Manager
Public Works	Winter Control	Public Works & Facilities Manager
Public Works	Public Transit	Public Works & Facilities Manager
Public Works	Waste Management	Public Works & Facilities Manager
Recreation Services	Recreation Programming	Recreation Manager
Recreation Services	Recreation Services	Recreation Manager
<b>Emergency Services</b>		
	Emergency Planning	Director of Emergency Services - CEMC
	Fire Services	Director of Emergency Services
<b>Business Services</b>		
	Asset Management	Asset Management Manager
	Financial Services	Deputy Treasurer (Finance Manager)
	Human Resources	Human Resources Manager

Department/Division	Service Delivery Area	Lead Staff Position
<b>Corporate Services</b>		
	Corporate Management	Director of Corporate Services, Deputy Clerk
	Information Technology	IT Manager
	Public Services	Deputy Clerk

### 3. Preparation of Service Profiles

Service Profiles were prepared for each of the Service Delivery Areas identified in the above table. The profiles contain a wide range of data and information on each Service Delivery Area describing what the service is, how the service is provided, budget inputs (budgeted and actual spending and full-time equivalent employees), outputs (volume of product or services produced), outcomes and, links to Township By-laws, Policies and Strategic Plan. Data from the Ontario 2018 Financial Information Returns for Loyalist Township and selected municipalities were also collected and, where available, used as benchmarking comparisons. Three training sessions were held with staff to assist in preparing the Service Profiles. The Service Profiles are attached to this report. The municipalities selected for comparisons are:

**Table 2 Comparator Municipalities**

Municipality	Population
Loyalist Township	16,971
Clarence-Rockland	24,512
Greater Napanee	15,892
Huntsville	19,816
North Grenville	16,451
Port Hope *2017 data	16,753
Russell	16,520
Selwyn	17,060
Mississippi Mills	13,163

### 4. Strengths, Weaknesses, Opportunities and Threats (SWOT) Workshops

Several SWOT meetings were held with each Service Delivery Area either individually or in a group of similar functional areas. A specific focus of the SWOT meetings was improving service delivery today and meeting changing population needs in the future.

### 5. Identification of Key Opportunities for Change / Improvement

Based on the feedback from the SWOT workshops and analysis of the Service Profiles, a master list of potential opportunities was prepared. The master list was

reviewed and a second list of key opportunities for improvement was identified, often combining several opportunities as common themes. These key opportunities are considered to present the greatest potential for service delivery improvements and/or to have a high priority in terms of meeting community needs. Another consideration was the degree to which each opportunity contributed to the achievement of the goals and objectives contained in the Strategic Plan. Several key opportunities involve more than one department. The remaining opportunities included on the original long list are included in the Appendix. Some of these may be worth pursuing at some time, but they have not been fully vetted, and some of them are likely not worth implementing.

## 6. Analysis

The most significant opportunities were reviewed in more detail; the findings are discussed in this report. Many other opportunities were identified and have been included in Appendix 1 for implementation by staff as and when appropriate. It must be noted that there are many initiatives that could be carried out, but it will not be possible for the limited resources available to immediately implement all the opportunities.

## 7. Ongoing Communications and Support with Township Staff

There was ongoing close consultation between Maclaren and Township staff throughout the review process to ensure the results had the support of, and ownership from, key stakeholders, and that these results could be implemented effectively.

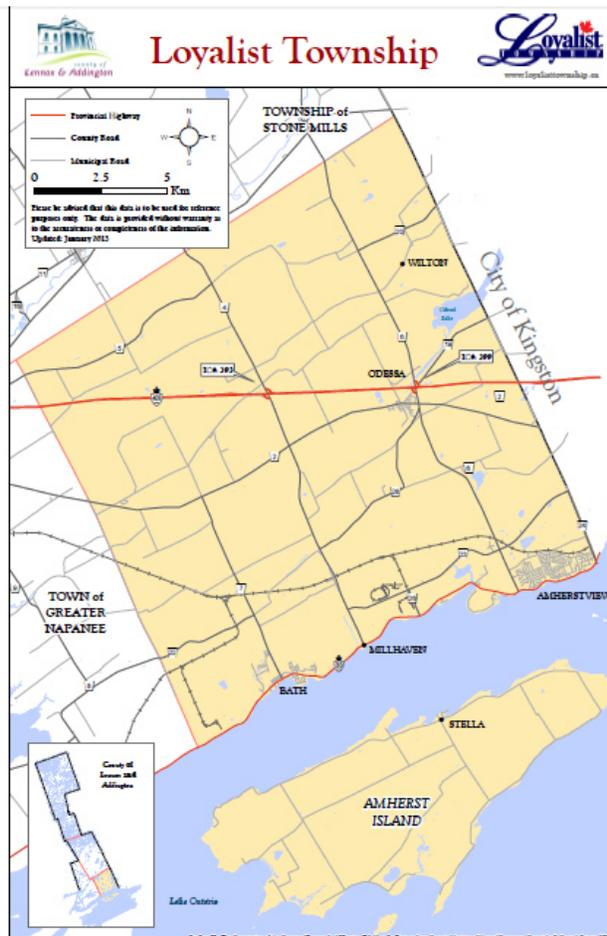
## 8. Report Preparation

This report was prepared and reviewed with management.

## LOYALIST TOWNSHIP OVERVIEW

### Political and Organizational Background

Loyalist Township was formed on January 1, 1998 from the amalgamation of the former Amherst Island Township, Ernestown Township and the Village of Bath. The Township exists as a lower tier municipality within the County of Lennox & Addington. While the



Township provides most of the municipal services to its residents, the County is responsible for, health and social services (Ontario Works, assisted housing and children's services), long-term care (John M. Parrott Centre), emergency services (paramedics and emergency planning) and county land use planning (Official Plan). Health and social services are provided jointly with Prince Edward County. The Township is responsible for the operations and maintenance services of County roads and bridges within its boundary. The County also provides services such as libraries, museums (although there are none in Loyalist at present) and economic development. Greater Napanee is the County Seat.

In August 2019, Council approved a corporate wide reorganization to improve efficiencies. The primary changes were in the creation of the Community & Customer Services (CCS) and the Economic Growth & Community

Development Services (EGCDS) departments. CCS includes most functions which deliver operational services to the community, including Public Works, Recreation and Facilities. EGCDS combines Planning, Building, Engineering, Economic Development and Water/Sewage services.

### Financial Overview

The following table summarizes the 2020 operating budget for the Departments.

Table 3 2020 Operating Budget by Department – General Rate

Service Delivery Area by Department	2020 Budget (\$000s)		
	Expenditure	Revenue	Net Operating
Economic Growth and Community Development Services	2,936	(1,890)	1,046
Community and Customer Services	10,870	(2,935)	7,935
Emergency Services	2,211	(190)	2,021
Business Services	976	(576)	400
Corporate Services	2,315	(218)	2,097
External Agencies <sup>(1)</sup>	2,719	(12)	2,707
<b>TOTAL LOYALIST TOWNSHIP</b>	<b>22,027</b>	<b>(5,821)</b>	<b>16,206</b>

Notes:

(1) Includes mostly Policing (OPP) plus Conservation Authority

The capital budget for 2020 is just over \$10 million.

Table 4 2020 Capital Budget – General Rate

Service Delivery Area by Department	2020 Budget (\$000)
	Capital Expenditure
EGCDS (Engineering Services)	5,908
CCS (Facilities)	128
CCS (Public Works)	3,039
CCS (Recreation)	261
Emergency Services	767
Business Services	0
Corporate Services (Information Technology)	205
<b>TOTAL LOYALIST TOWNSHIP</b>	<b>10,308</b>

The table below summarizes the 2020 budget for the Water and Sewer utilities.

Table 5 2020 Operating Budget - Utilities

Service Delivery Area	2020 Budget (\$000s)		
	Expenditure	Revenue	Net Operating
Water	5,204	(5,204)	0
Sewer	4,112	(4,112)	0
<b>TOTAL LOYALIST TOWNSHIP</b>	9,316	(9,316)	0

Expenditures on capital projects by the Water and Sewer utilities total about \$6 million in 2020. About \$1.8M of this is charged to utility rates in 2020. The balance is recovered from ongoing development (agreements and connection charges), reserve funds and gas tax subsidies.

Table 6 2020 Capital Budget - Utilities

	2020 Budget (\$000)
Service Delivery Area by Department	Capital Expenditure
Water	4,947
Sewer	1,229
<b>TOTAL UTILITIES</b>	<b>6,176</b>

The table below provides the operating costs for the “Other Service Areas” within Public Works, which includes Public Transit (which is charged against properties in the Transit Service Area only) and the Amherst Ferry, which is operated on a breakeven basis with provincial funding of the deficit.

Table 7 2020 Operating Budget – Other Service Areas

	2020 Budget (\$000s)	
Service Delivery Area	Amherstview Transit	Amherst Island Ferry
Operating Costs	711	3,179
Fees & User Charges	(70)	(320)
Amherstview Area Rating	(500)	
Grants and Other Revenues	(141)	(2,859)
<b>TOTAL LOYALIST TOWNSHIP</b>	<b>0</b>	<b>0</b>

## Community Overview

This section examines some key demographic trends that are and will continue to impact the Township’s delivery of services. It is useful to first point out some geographic features that are unique to the Township.

First, Loyalist Township is part of the Kingston Census Metropolitan Area as defined by Statistics Canada. This proximity to Kingston has resulted in the development of Amherstview as a “suburban” residential community where most of the population growth in the Township has occurred. This has also resulted in a significant cross flow of resident populations and workers in terms of employment, transit and recreational services for example. On the other hand, the smaller villages of Bath and Odessa, as well as the rural areas, have not changed that much over the years.

Second, Amherst Island presents unique challenges to the Township in the delivery of services because it is an island. Examples include the provision of ferry services, emergency services and landfill operations (garbage disposal).

Third, the rich history as a settlement area for the United Empire Loyalists after the American Revolution, and its frontage along Lake Ontario, adds to the Township’s cultural and natural diversity.

## Demographic Trends

Loyalist Township has experienced a moderate growth in population since 2006, increasing by 2,140 people or 13.7%. In comparison, Greater Napanee increased by only 640 or 4.2%. The City of Kingston grew by 13,370 people or 11.0%. The strongest period of population growth for Loyalist occurred between 2006 and 2012, but the rate of growth has fallen off since 2012.

Table 8 Population Growth

	2006-2012		2012-2019	
	Absolute Change	Percentage Change	Absolute Change	Percentage Change
Loyalist	1,518	9.7	622	3.6
Greater Napanee	208	1.3	471	2.9
City of Kingston	4,861	4.0	8,509	6.7

Source: Statistics Canada. Table 17-10-0142-01 Population estimates, July 1, by census subdivision, 2016 boundaries.

Amherstview's population growth increased by 16% between 2006 and 2016; accounting for 70% of the total Township growth. Bath captured the remaining increase largely due to a jump in total population between 2006 and 2011. The population for the rest of the Township remained virtually unchanged over the ten years.

Table 9 Total Population Change by Community: 2006-2016

	Loyalist Township	Amherstview	Bath	Odessa	Amherst Island	Rest of Township
2006	15,570	7,890	2,760	1,270	450	3,200
2011	16,640	8,410	3,340	1,250	405	3,235
2016	17,380	9,150	3,420	1,270	420	3,120
Total 10 Year Change	1,810	1,260	660	0	-30	-80
Avg. Annual 10-Yr. Growth Rate	1.2	1.6	2.4	0.0	-0.7	-0.3

Source: Hemson Consulting Ltd., Population, Housing and Employment Projections to 2046. Prepared for Loyalist Township, September 18, 2019.  
 Statistics Canada: 2006, 2011, 2016 Census (for Amherst Island).

Following a development freeze that was in place for a number of years, Odessa currently has 381 approved subdivision lots that are being developed, which will result in growth in that community in the coming years.

Amherstview's population is significantly younger when compared to the rest of the Township which reflects its attraction to younger families, many of whom work in Kingston but look for more affordable housing in Loyalist Township. Residents of Amherst Island are the oldest which can be attributed in part to the presence of retired households.

**Table 10 2016 Average and Median Ages: Loyalist and its Communities**

	Loyalist Township	Amherstview	Bath	Amherst Island	Rest of Township	City of Kingston
2016 Average Age	43.3	40.6	50.0	52.8	43.8	42.3
2016 Median Age	45.0	40.4	55.8	58.9	46.4	41.9

Source: Statistics Canada 2016 Census

According to the [population projections](#) prepared for the Township in 2019, the Township expected to continue to experience a continued modest growth reaching a population of 22,600 by 2046. The growth rate is projected to be lower over the last 15 years compared to the first 15 years of the forecast period largely due to an aging population. The population growth is also expected to include a significant increase in the percentage share of residents age 65 years and older.

Future population growth is expected to continue to be concentrated in Amherstview accounting for 62% of the total 30-year increase in population for the Township.

Table 11 **Population Forecasts for Loyalist and its Communities  
2016-2046**

	Loyalist Township	Amherstview	Bath	Odessa	Amherst Island + Rest
2016	17,390	9,150	3,420	1,270	3,540
2031	20,430	11,040	4,270	1,430	3,690
2046	22,600	12,400	4,890	1,550	3,760
2016-31 Growth	3,040	1,890	850	160	150
2031-46 Growth	2,170	1,360	620	120	70

Source: Hemson Consulting Ltd., Population, Housing and Employment Projections to 2046. Prepared for Loyalist Township, September 18, 2019.

It is difficult to project population change over a 30-year period, especially for municipalities with a small population base. Population growth can accelerate with a single relatively large new residential subdivision, or the addition of a large new industry, and then just as suddenly level off. Population growth especially in Amherstview is also linked to Kingston's economy and housing market. Recent projections for the City of Kingston also expect modest growth up to 2046. The City's population is forecast to increase annually by about 620 people or 0.5%, reaching 146,300 in 2046 compared to 127,700 in 2016. Any growth significantly above the projections, or unforeseen increases in house prices, would also likely result in a greater increase in the population growth of Amherstview; and to a lesser degree, Bath, Odessa and the rural areas.

### Service Delivery Implications

Loyalist is expected to experience an increasing divergence in resident service needs and expectations over the near future resulting from a growing, younger and more family-oriented population centred on Amherstview and a widely dispersed, aging population in the remainder of the Township. For example, seniors residing in the rural areas may demand better transit services as their mobility decreases. Seniors' demand for more accessible parks, age-friendly recreation services and new seniors' centres will also likely increase over the immediate future. Younger households living in Amherstview will have a greater need for recreational programs and facilities for children, or improved connections to get to work in Kingston. The challenge for the Township is to respond to the changing resident needs in an effective and efficient manner.

## IMPROVEMENT THEMES

The themes reviewed in this chapter are a compilation of key issues and opportunities that the Township is faced with today in terms of transitioning to a more progressive, efficient, effective and responsive municipal government. A series of opportunities to

improve Township services and operations were developed with extensive input from staff and Councillors and a review of the Strategic Plan and other documents. This extensive list was reviewed to identify the most significant steps the Township could take. These were identified as change “themes” and are discussed in this section. Other opportunities that were identified are also listed in Appendix 1, and staff or Council may choose to pursue them as well.

The following table summarizes the themes discussed in greater detail below.

**Table 12 Summary List of Improvement Themes for Selected Service Areas**

Customer Services	IT Strategy	Records Management	Corporate Communications
Shared Services	Procurement	By-law Enforcement & Policing	Planning Process
Economic Growth	Recreation Centre / Hub	Solid Waste	Fleet
Museums / Heritage	Island Ferry	Transit	Winter Roads
Budget Process	Performance Management	Staffing	

Each Improvement Theme contains 4 sections: 1) an overview of the current situation; 2) a summary of identified issues; 3) an analysis of the issues and possible options, and 4) recommendations.

Corporate Wide
<b>Customer Services and Communications</b>
Current Situation
<p>The following list summarizes the existing customer service locations that the Township provides to residents and businesses.</p> <ul style="list-style-type: none"> <li>• W.J. Henderson Recreation Centre – Amherstview Recreation services / programs (pool, arena) Accommodation for County operated Library Meeting room bookings Garbage tags, dog tags, property tax and utilities bill payments / 24 hr. drop box, recyclable bins Transit passes</li> <li>• Leisure &amp; Activity Centre (LAC) – Amherstview Recreation services / programs, dog tags, property tax and utilities bill payments drop off</li> <li>• Municipal Offices – Odessa</li> </ul>

Property tax, water payments (in-person / drop box), sale of bag and dog tags, licenses, cemetery services, commissioning of documents

- Bath Fire Station – Bath  
Drop box tax, water payments
- Amherst Island Ferry Office – Amherst Island  
Ferry ticket books
- Manitou Office– Amherstview

Planning and building services, including building permit and planning applications and fees, property inquiries, new civic address and water meter request.

(The Manitou office is located in rented space beginning in 2020.)

In addition, garbage tag bags can be purchased at commercial establishments throughout the Township as well as the Violet and Amherst Island Landfill sites. Dog tags are also sold at the Amherstview Pet Hospital and a gas station in Bath.

The Township's web site is another very important communications and service delivery tool. The web site recently underwent a major overhaul in partnership with eSolutionsGroup. The new web site was launched in September 2020, but with no significant new payment options expected until 2021. Notwithstanding, residents are still able to pay their water and tax bills through online bank accounts and Recreation users are able to pay online through the PerfectMind software platform.

Part of the W.J. Henderson Recreation Centre's planned expansion and reconstruction is a new, consolidated municipal office. The new complex would become a sustainable community hub or community centre.

#### Issues

The establishment of the new community hub would provide the opportunity to centralize important government services in the largest and fastest growing urban community. The hub could become the full service one-stop centre, although the remote drop boxes and improved on-line payment and registration facilities will remain.

In the meantime, services are provided at a range of locations, with no consistency in what is available at each location. Most importantly, the municipal offices in Odessa provide a range of services, but not registration for recreation programs. The Client Service function at the W.J. Henderson complex can provide complete recreation services but cannot respond to even basic questions about tax or water payments. The Leisure and Activity Centre staff provide some transactions for clients, Ghey take payment for single classes is required. They are the first point of contact to attend participants into class to allow for accurate reporting, answer a vast range of questions and transactions including swimming registrations, ice bookings, meeting room booking community hall rentals.

One inconvenience to the public is the closing of municipal offices on Friday afternoons in the summer with the exception of LAC and W.J. Henderson. This results in a situation where the public can only receive limited services at times during what is generally accepted as part of the work week. Some municipalities close earlier on Fridays (e.g. 4 p.m.) but complete closing for the afternoon is unusual. The current CUPE agreement provides for the Friday afternoon closing in the summer.

Both the W.J. Henderson and LAC are open evenings and weekends until July at which time both locations are open until 4:30 Monday to Friday.

### Analysis

Customer service is about efficiently and effectively connecting residents (and businesses) to the Township's services. Some residents may be at ease using technology to pay bills (see Corporate Communications) while others prefer to do transactions in person or obtain information by phone. Some transactions also require attendance to pick items up (dog tags, bag tags, recycling bins, etc.). Because of the diversity and geographic distribution of its resident customers, the Township needs to provide a variety of communications and service channels and make transactions with the Township as convenient as possible.

This suggests that virtually all transactions should be possible from two locations – the current Township Hall in Odessa, and the W.J. Henderson complex in Amherstview. Both locations are staffed with customer service staff used to dealing with the public, albeit for a limited range of transactions. Having all Customer Service Representatives (CSRs) part of the same division will provide for consistent training and consistent customer service if the right tools are in place.

The CSRs should be the first point of contact for phone calls when the caller is not aware of the extension of a particular staff member, and should handle emails, or service requests that come from the Township's website. CSRs should answer inquiries when they are aware of the correct answer, and refer calls, emails or service requests that seek information they do not have or seek some further response (e.g. fix a pothole) to the appropriate person or group within the Township. Those providing counter service can handle telephones, emails and service requests when counter volumes allow. Some testing will be required to ensure all CSRs are fully occupied. It may be appropriate to use staff who are not CSRs (e.g. the Accounting Clerks at Odessa) to provide coverage for lunches or breaks if the requirement for CSRs is not high enough to have staffing levels to cover all requirements.

To allow the full range of transactions at both locations, the Client Service Representatives will require access to the key software each group uses. The PerfectMind software will have to be available at Odessa (access to the web applications may prove sufficient to accommodate registrations), and the staff at the

W.J. Henderson complex will have to have access to the Finance system to allow basic questions to be answered and transactions to be recorded. All CSRs will require some training, likely from the staff currently providing the same functions at the two locations, in order to be able to handle the most frequent transactions. Note that there will still be issues that must be referred to a specialist, but the goal is to minimize those issues.

The new offices at the Manitou location house all the Planning and Building staff. Most transactions in Planning and Building require considerable dialogue and knowledgeable planning staff to address them accurately. Other municipalities have found that attempting to conduct these transactions at general purpose Client Service Centres is not productive and often leaves clients unsatisfied. The single location for in-person receipt of planning and building applications should therefore be at the Manitou site, giving access to expertise as required. While some such applicants may also wish other services, that tends to be rare and does not justify placing CSRs with the full range of services at Manitou when the services are already available at W.J. Henderson as well as in Amherstview.

Attempting to provide a range of transactions at the Leisure and Activity Centre has proven difficult as most staff is engaged in providing classes at various points during the day. The Centre is reasonably close to the W.J. Henderson complex and residents should be expected to go to the complex if they wish to conduct transactions with the Township in person. Rather than having staff at Leisure and Activity Centre for the purpose of collecting for single lessons or classes, it would be more appropriate to sell single or multiple class tickets at the W.J. Henderson complex, with the instructors to collect the tickets. However, this may present another opportunity for remote or virtual interaction – simply through making a computer or tablet available at the Leisure and Activity Centre to facilitate connection to the PerfectMind web application.

The other remote service centres (e.g. drop boxes) can also be continued as long as they handle a decent volume as they are low cost and can be more convenient to some residents and a drop box could also be added to the Leisure and Activity Centre.

Phone calls to the Township are handled initially by an automated attendant, which is the expected outcome. General enquiries at the Municipal Office have usually been handled by Accounting Clerks in the past and recently by the Client Service Representatives as part of a trial test. This might be improved by providing a transfer to the CSRs at the W.J. Henderson complex when staff at the municipal office are busy.

The customer service experience will also be improved with more effective management of service requests and work orders, which is addressed in the Information Technology section in the next Improvement Theme.

To provide reasonable customer service, the offices (Township Office, W.J. Henderson and Manitou) should be open Friday afternoons, even if not fully staffed. This will require some discussions with the Union involved. W.J. Henderson is staffed Friday afternoons and some evenings with part-time staff, which could be a solution at other locations if required. There may also be some value to offering some evening hours, at least at the W.J. Henderson site.

Note that if the community hub is completed and all Township offices are consolidated in the one location, it may still be necessary to operate CSR locations elsewhere, particularly in Odessa, even if the in-person service is only provided on a part-time basis. Options should be reviewed at that time.

**Recommendations**

- The Township provide two full-service Customer Service Centres at the Township Office in Odessa and at the W. J. Henderson complex in Amherstview. A third location at the Manitou offices should only handle planning and building matters.
- The Leisure and Activity Centre should not be considered as a location for a Client Service Centre, but should it be necessary to have a person present to collect tickets, that person can also offer services while they are there.
- Staff at the Client Service Centres should be given access to the software they will need to provide the full range of services.
- Community and Customer Services should manage the provision of Client Service Centre services at both locations, using trained Client Service Representatives for most purposes (although other staff may cover as required).
- The staff (and associated vacancies) in Finance and Recreation that are primarily providing Client Services should be transferred to that function and should cross-train each other and receive additional training as required to ensure they are effective CSRs, able to handle the full range of transactions.
- Establish simple customer satisfaction key performance indicators and a customer interaction tracking system with regular reporting framework.
- Discuss with the Union how to staff the Client Service Centres on Fridays through the summer.
- To the extent a wider range of services can be offered in the Ferry Office without increasing staffing, they should be offered. Ferry tickets could also be sold at the Client Service Centres.

Corporate Wide

**Information Technology (IT) Strategy**

Current Situation

Loyalist has several important IT initiatives underway:

- The Township has **Vadim** as a **Financial system**. It is considered effective, but difficult to draw information from; as a result, many managers seek assistance from Finance to prepare reports. A new reporting package, **FMW-Citywide Enterprise Budgeting Software**, is being implemented to make it easier for managers throughout the organization to seek information from the financial system.
- **CityView** has been identified as the preferred software package to **manage planning and building permit** applications and the resulting inspections. It will track the processing of applications. It can accommodate on-line, electronic applications, and can allow inspectors to examine electronic plans while in the field making inspections, and to record the results of their inspections. The package has been implemented to date for building permit applications and inspections, but not for planning applications and there are no funds for this purpose in the budget. There is ongoing discussion at the County about possibly implementing the planning application County-wide.
- **CityWide** has been selected as the software package to **manage Service Requests and Work Orders**. Once fully implemented it can facilitate people identifying problems or seeking resolution of issues (submitting Service Requests). It also can establish Work Orders relating to regular work, the results of staff inspections and the Service Requests from the public, track the time and cost (including materials and vehicles) of performing various Work Orders and link the Work Orders to various infrastructure. The infrastructure is listed in the **Asset Management** module, which will assist in determining the condition of assets, and the priority for improvements. At present, the assets are listed and used for budgeting and the work order portion is used by Public Works and Utilities, but the Service Request portion, and the link between work orders and assets is not complete.
- The **GIS system** is currently staffed within the Planning group and it continues to evolve to serve new uses in many departments throughout the Township's organization, such as linking the assets in the Asset Management and Work Order components to those in the GIS.
- The capability and expectations of web sites is ever expanding, and the COVID-19 experience has made them even more important as a means of communication with the public –disseminating information to the public, and receiving information, conducting transactions and receiving service requests. The Township's web site has served well in providing information to the public, and conducting some transactions, particularly in the recreation sphere (before COVID-19 closed programs and facilities). The site has recently been redesigned to improve the consistency and responsiveness of the site, but additional work is required to expand the range of transactions that are possible and make the site simpler to use.

## Issues

Issues related to the web site are identified and analyzed separately under Corporate Communications.

There is no overall strategy or project priority listing. As noted above, there are a large number of projects that must be completed to improve the effectiveness of Loyalist's IT initiatives. Most are underway to varying extents, but there are limited resources, and progress has been delayed by the COVID-19 response. With so many important projects, there is no over-all strategy that sets out the intended outcome. While most of these initiatives seem appropriate, they are proceeding independently without being part of an over-all strategy that ensures the pieces will fit together as part of a solid comprehensive system. There has also not been a determination of the relative priority of projects.

There are some pieces that some municipalities include in their IT systems that Loyalist does not have. The most obvious are a Human Resource Information System and a Fleet Management System, often linked with a system to control vehicle fueling. The Fleet system could be achieved using the Maintenance Manager module within CityWide. It is unclear how widespread computer literacy is among staff, and the implementation of new systems may require additional training programs.

There is concern that there are inadequate resources, both in the IT group and within the GIS group, though it is not clear what type of resources are most required. There is also uncertainty which location of responsibility for GIS in the Planning group or the IT group is optimal.

The GIS Strategic Plan has also not been updated since 2009 and, as noted above, there have been significant increases in the demand for GIS services throughout the organization. The Township is also the only lower tier municipality with in-house GIS capabilities which needs to be considered when looking at shared services with the County (see also Shared Services Improvement Theme below).

## Analysis

There is a need to create an overall IT strategy to ensure the parts will all fit together appropriately, to identify what is missing to create a comprehensive solution and to identify priorities for implementation and direct resources appropriately. There is also a need and value from increased resourcing to the IT program, however it is less clear whether this should come from increased staffing, shared services with other municipalities, or external consultants. Generally, help desk support is better provided internally, while project implementation could be done in-house or by contractors, depending upon the timeframes involved, and the consistency of the effort required – using the same staff and skills. Strategy and procurement/licensing of IT systems can also be carried out on a shared service basis.

There are alternative strategies for IT enhancement that need to be considered. Are integrated programs from a single vendor the best approach or should “best of breed” programs be used and integrated by a “translator” that allows data to be shared? Should data be retained locally, or are cloud-based solutions more flexible and appropriate? Can apps, used by employees, and/or available to the public, provide a more flexible way to access or input Township data from a variety of device types?

Since GIS services is a very integral component of the overall Information Technology capabilities of the Township, a corporate wide IT strategy should include GIS. With GIS still an important service to Planning, it is also used by many other departments, and the appropriate home for GIS resources needs to be considered, taking into account Planning needs, and those of other departments.

**Recommendations**

Loyalist should initiate development of an IT Strategic Plan incorporating an updated GIS Strategic Plan, outsourcing the project to a vendor familiar with municipal IT and GIS systems for municipalities in the 20,000 to 50,000 population range including the key packages used in Loyalist. The Strategy should identify:

- The target IT systems and relationships in two to three years.
- The major projects to implement the target system.
- The relative priority and order of implementation of the projects.
- The potential to build shared services into the system, considering sharing options with Kingston, Napanee and Lennox and Addington County.
- The appropriate place in the organization and level of staff required to implement the strategy and provide any internal resources required for implementation and support, including both IT and GIS requirements as well as additional required staff training.

**Corporate Services**

**Records and Information Management**

**Current Situation**

A Records and Information Management (RIM) program supports effective and efficient decision making with respect to the creation, retention, retrieval and disposition of all Township corporate records including electronic or digital records to ensure that needless records are not created or retained and that valuable records are preserved. The maintenance and disposition of Township records must comply with Ontario legislative requirements of the Municipal Act, the Municipal Freedom of

Information and Protection of Privacy Act and other provincial or federal government (e.g. Personal Information Protection and Electronic Documents Act) regulations.

Records and Information Management is under the direction of the Township Clerk. In 2007, Loyalist Council approved By-law 2007-110 to establish retention periods for the Township's records. The By-law was amended by By-law 2009-78. The Retention Schedule is based on The Ontario Municipal Records Management System (TOMRMS) document classification system which is received as updates on an annual basis. TOMRMS is a file classification system developed in partnership with the Association of Municipal Managers, Clerks and Treasurers of Ontario (AMCTO) for managing paper and electronic records of municipalities in Ontario. The primary components of TOMRMS are: classification / indexing system; retention schedule based on current legislation; policies for Records Management, and; procedure of Records Management.

The Clerk and Deputy Clerk supervise 2 part-time staff (File Clerks) who play a role in the Information Management sub-service area. The part-time positions include a File Clerk and a contract File Clerk.

#### Issues

A RIM system is complex containing many elements related to inventory, retention and disposition, classification, active records management and control, vital records protection and privacy, document digitizing, image management, strategy development and policy formulation, legislation compliance and so on. The challenges are to keep the entire corporation up-to-date and to maintain strong support from management and council members. Changes in legislation and technology also put pressure on education and training.

Notwithstanding that the Township has a Retention By-law, staff have indicated that a more robust and comprehensive RIM program is required. Over the years, the records management and digital files system has become somewhat disorganized and difficult to secure as individual departments have modified the system to suit their particular needs. As a result, there are differing levels of noncompliance that exist between departments. Personnel changes within departments further weaken the ability to maintain the continuity of cataloguing and tracking records

The Township does have software that incorporates TOMRMS, allowing staff to input records, create labels, and produce retention lists, but the software is limited in its abilities and quite outdated. It also has been utilized mostly for paper records while excluding the majority of electronic records.

#### Analysis

Loyalist's records and information holdings are valuable corporate assets needed to support effective decisions, meet operational needs and support the business, legal

and accountability requirements of the Township. A RIM program also promotes the principles of open government, public accountability and government transparency, principles that are important in today’s society. Both paper and electronic records are increasing at a significant rate which is, in part, a reflection of changes in technology making it easier to create and transmit information. Community needs for municipal services is also becoming more complex; having a good records management system is important to deal with potential litigation claims against the Township and to provide greater access to information requests in the future.

It is important, therefore, that the Township move forward on a priority basis in developing a robust Record Management Policy along with a detailed implementation plan. The emphasis should also be on establishing an electronic or digital records management system which will not only facilitate records management but also reduce the need for physical storage space.

**Recommendations**

- Continue to develop the Records Management Policy as well as the Records Management Program Implementation Plan, including education and training elements.
- Together with the above recommendation, continue to pursue the replacement of existing records management software with a new, modern software platform that integrates well with an electronic management system. This should also co-ordinated with the IT strategy referred to in the previous Improvement Theme.

**Corporate Wide**

**Corporate Communications (External)**

**Current Situation**

External Communications is one of the Township’s Strategic Priorities in its Strategic Plan, with two objectives: 1) to engage the public through a broad range of communication and marketing on multiple platforms, creating greater opportunities and engagement fostering a positive public / municipal relationship, and; 2) to promote Loyalist community identity.

The Township created the position of Communications and New Initiatives Coordinator in 2018 to lead these initiatives. The incumbent has been expanding and improving communications between the Township and its residents, ensuring a more consistent message and regular delivery of that message through a wide range of channels, ranging from written communications to updates on the web site, and to a social media posting aimed at a variety of resident segments.

A new web site went on-line in September, a major step to improve communication with residents, moving beyond the “brochure ware” feel of the former site. There are already some transactional functions on-line. The recreation programs and facilities can all be booked on-line (although none are offered at the moment due to COVID-19); as well, tax and utility accounts can be accessed.

#### Issues

It is important for residents to obtain accurate information in a timely, streamlined manner. Loyalist Township has a diverse population base that it has to communicate with, ranging from younger families in Amherstview to older and retired residents in rural communities. There exists a constant and diverse out-flow of information that goes out to the public which became very acute during the COVID-19 pandemic with cancelled events, ferry interruptions, facility and program closures etc.

Staff stated that residents don’t often have a clear understanding of the services provided by the Township and how it affects their quality of life. Others mentioned that the Township does not effectively celebrate or communicate positive achievements achieved by both the Township and the community. Branding was seen as another method to a customer service commitment and to promote civic pride.

There have been important steps achieved in the last 18 months, although progress has been limited by the availability of resources. The launch of the new web site brought more consistency and dynamism, likely the most important part of the Township communications program, and one that provides information 24/7. Further improvements are being implemented over the fall, 2020.

Recreation has a part-time position in marketing and branding with a focus on promoting rentals, programs and special events to the public using a wide range of communication platforms including social media, newsletters, print material etc. The department has not been able to keep this position filled and effective, which is impacting its ability to communicate and market programs and services. The position is also supposed to identify sponsorship opportunities to increase revenues but success has been very limited because of the skill gaps associated with the position being part-time.

#### Analysis

The Township’s customer service and communications strengths will be significantly enhanced once the sustainable community hub and new web site are completed. However, the community hub may not be completed for some years. The web site should eventually be able to provide a one-stop, self-serve capability for all applications and payments. The more that residents can deal with the Township electronically, the lower the costs and the more staff time becomes available to meet their needs.

The Township's Economic Strategy addressed the importance of branding as a strategy differentiating Loyalist from competitors and for creating an identity that is distinct from Kingston. A branding program can also extend beyond achieving economic development objectives and include Township residents by enhancing civic pride and building partnerships. At present, there is no consistent branding program being utilized at the Township.

The Township's web site will still not have the full range of e-commerce capability, limiting the ability to deal with the dog tags and bag tags that make up many of the transactions with residents. It will also not have the ability for members of the public to record "service requests", so they will need to continue phoning when something needs correcting. The new website has a "report a concern" function that allows residents to report problems but the information still needs to be entered into CityWide manually.

Development of a Township app is underway and may assist in both the day-to-day communication with residents, as an economic development tool, and to building a stronger brand for the Township.

The part-time status of the marketing and branding position in Recreation has made it difficult to fill with staff having the right skills and capabilities in marketing graphic design. This has resulted in inconsistent communications and incomplete or inaccurate information dissemination. Due to the limited resources, other staff such as Coordinators are sometimes required to take time from their job responsibilities to help out.

Marketing and promotion skills are important to recreation services and programs, but they are also important to many other services the corporation delivers. The skills, and the position, should be part of a corporate wide or centralized approach to external public communications in order to ensure the skills serve all corporate services. But there must be strong coordination with individual service delivery departments, particularly Recreation. It may be necessary to upgrade the position from part-time to full-time both to attract the required skills, and to have sufficient resources to meet corporate requirements. The sponsorship program should also be more effective if managed on a corporate basis, and if operated to complement the Township's branding initiatives.

## Recommendations

- Development of the web site should continue and incorporate at least the following components as soon as possible:
  - An e-commerce capability allowing all financial transactions with the Township to be conducted on-line as often as possible.
  - A Service Request function allowing residents and businesses to seek various forms of action from the Township. The system should be integrated with the CityWide software system so Service Requests can

- automatically be turned into Work Orders assigned to appropriate staff for execution (assuming the request is within policy) or reassignment.
- The CityView software implementation needs to be completed so it will be possible to apply for building permits and planning approvals electronically.
  - The Township should initiate a branding exercise, clearly identifying the image the Township wishes to present itself and identifying how that will be accomplished.
  - Development of a Township app should be completed.
  - Consider centralizing all marketing, branding, sponsorship and related activities with the Corporate Communications group and transferring the staff position involved while ensuring that the group works closely with Recreation and other departments.

Corporate Wide
<b>Shared Services with County and Kingston</b>
Current Situation
Loyalist Township has several examples of shared services already being implemented with surrounding municipalities. Examples include joint procurement of equipment between the Loyalist and Kingston fire departments, the agreement with the County to have Loyalist perform road maintenance for the County, the purchase of transit services and recycling processing from the City of Kingston as well as a number of joint procurement processes with other municipalities (surface treatment, weed spraying, salt, longitudinal line painting, guiderails, sign inspections, etc.).
Issues
The existing shared services result in both a better service to the public and lower costs to the Township, largely as a result of the economies of scale. As an example, passengers only pay one fare to ride a bus from Amherstview to downtown Kingston and Loyalist only pays for the portion of service that is within the Township. Similarly, the road maintenance agreement results in the need for one set of trucks, operators and depots to handle both County and Township roads and complete them within the time limits based on the priority of the roads. During the SWOT workshops, it was mentioned by staff that there may be other opportunities to pursue partnerships with other municipalities to improve the cost effectiveness in the shared delivery of services.
Analysis
Municipalities are constantly faced with finding money at budget time. Shared service partnerships can help in delivering services as efficiently and effectively as possible and in finding economic efficiencies or economies of scale by working with other

municipalities. Still, any partnership needs to yield not only financial gains but also better result in terms of citizen responsiveness and equity.

The following table summarizes examples of potential shared services and inter-municipal partnership initiatives.

**Table 13 Shared Service Opportunities**

Service Area	Potential Municipal Partners	Comments
Expand joint procurement of standardized, high volume products (e.g. equipment, office supplies, tools, parts), printing services, contracted services (e.g. cleaning HVAC, specialized sports field maintenance), utility chemicals, pipes, valves, hydrants, etc.	County and Area Municipalities City of Kingston	Simplest to initiate Partnerships would include procurement needs between specialized service delivery areas in each municipality (e.g. Fire departments, Roads, Aquatics)
Historic buildings – adaptation / reuse	County	Possible uses include community centres, museums, discovery centres
Transit	Kingston (Kingston Access Services) Deseronto Transit Accessible Taxis	Potential “specialized transit services” expansion into Loyalist Township.

Service Area	Potential Municipal Partners	Comments
Information Technology (IT) <ul style="list-style-type: none"> <li>- Human Resources and payroll systems</li> <li>- GIS and mapping services</li> <li>- Public inquiry recording and tracking</li> <li>- Service Request / Work Order systems</li> <li>- Financial Management</li> <li>- Planning and building applications and permit recording, payment and processing (see also Planning Process Improvement Theme)</li> <li>- Asset Management software</li> <li>- Network infrastructure and support services</li> </ul>	County and Area Municipalities Kingston	The biggest challenge in IT sharing is that the existing software platforms would be incompatible between the County and Area Municipalities and would then coordinate the timing of investment in new or upgraded software.
<ul style="list-style-type: none"> <li>- Passenger recording and payment application</li> </ul>	Ontario Ministry of Transportation Hwy 407	
Fleet Management System	Greater Napanee, County, Kingston	
Digitization and cataloguing (Museums and Libraries)	County and Area Municipalities, Kingston	
Organic composting / energy reuse	Kingston, Greater Napanee	
Recreation Programming and Services	Kingston	Kingston has agreed to contribute to the capital cost of a new Aquatics Centre.
311 Public Service System	County system, or Kingston	

Service Area	Potential Municipal Partners	Comments
Internet and social media; mobile apps	County, Kingston	Greatest potential mutual benefits related to economic development including tourism promotion in partnership with the County. Another possible area is information on recreational facilities and services.

The biggest opportunities would likely be in the software field. In the County there are five of each type of system or, in some cases, fewer because municipalities are too small to gain net benefits from an application. Kingston will have another, including some that Loyalist and likely the County cannot support, such as a Fleet Management System, or a Human Resource Information System. The cost of the systems themselves could be reduced if licensed in common, and the implementation, support, and eventually upgrade costs, could be reduced – and the Township could gain access to systems and capabilities it does not currently have. Some opportunities will come from the implementation of new systems, whereas some will come from the gradual upgrade of existing systems, ideally with one learning curve and one support organization.

A smaller municipality has an advantage in being close to the people and delivering services in line with community needs. Combining that advantage with the economies of scale where they exist using shared services provides the best of both concepts.

There are substantial barriers to shared services. Each municipality in a discussion will want to maximize its benefits. This can result in a shared service provider that does not respond to user needs, in users that establish unique and unnecessary requirements that increase costs, or in each partner wanting to control or manage the process. These concerns can be overcome with strong committed leadership.

**Recommendations**

- Expand procurement partnerships with the City of Kingston and / or the County, developing standing offers for some goods and combining volumes on others.
- Expand or modify shared services as discussed in Other Opportunities
- Undertake preliminary discussions at the Mayor / Warden/ CAO levels to determine interest in shared services and to create a Steering Committee if interest exists.
- Select a priority initiative such as IT, and have the Steering Committee develop a strategy and implementation plan taking into consideration:

- Inventory of existing software and applications used (including web site elements).
- Attributes of above: when purchased; expected replacement period; weaknesses and strengths.
- Current plans to renew, update or replace applications
- Needs assessment of partners.
- Research on new IT / municipal applications.

<b>Corporate Wide / Business Services</b>
<b>Procurement</b>
<b>Current Situation</b>
<p>Procurement is currently conducted by each department with the Corporate Procurement Specialist in the Business Services Department providing expert input. There is a robust corporate procurement policy. There is one FTE dedicated to procurement in the Business Services Department with each department also providing specific knowledge and conducting their own processes. Participating in a shared services procurement program is one opportunity; however, issues were also raised with the operation of the current program that can be dealt with if it remains in-house.</p> <p>An overall procurement policy has been recently updated by the Township.</p>
<b>Issues</b>
<p>Different approaches to procurement can lead to inconsistencies in the process. However, the procurement process is only one aspect of obtaining resources, equipment or knowledge from outside the organization. Contract Management is another key component in the procurement processes that many organizations struggle with in terms of execution or implementation of a procurement decision. During the SWOT discussions there was a suggestion that procurement be centralized, requiring a “sign-off” from Business Services on each purchase order. This approach did not receive wide support with considerable concern about the potential impact on operations if procurements were delayed awaiting approval.</p>
<b>Analysis</b>
<p>The procurement process has many risks that can lead to litigation and the award of damages to vendors. There are also risks that managers throughout the organization may exceed their authority or even procure in a non-arm’s length relationship. These risks could be managed through a centralized process, but that may not eliminate the risks to the organization entirely. In fact, some large thefts in other organizations have involved representatives of the procurement group. In the case of Loyalist Township,</p>

the Township does have internal risk mitigating controls which are also checked and audited by an external auditor.

There are also a wide range of procurement circumstances. Routine repetitive purchases require much less expertise than unique or unusual purchases. Many organizations with centralized systems experience severe problems when work gets backed up, and materials or services cannot be acquired on a timely basis. However, continuing to do things “the way we always have” is not always the best approach.

The value of procurement expertise to an organization can be maximized, and the risks of poor procurement minimized, with a series of roles:

- Continue to provide guidance on the overall use of the procurement policy.
- Provide expertise and creativity for complex procurements at the request of other staff.
- Develop standing offers or other instruments for use throughout the organization.
- Periodic review or audit of a sample of transactions to ensure their adherence to procurement policy, and to test the appropriateness of ongoing practices; update processes and procedures to facilitate compliance and procurement activities as required.

Proper contract management is also of benefit. Assistance in determining how to manage and mitigate when the procurement does not go well will often depend on steps taken early in the procurement process. Good procurement can also help avoid issues in the contract management stage. Departmental input into the specifications for a tender or request for proposals is always needed to ensure the goods or services procured actually meet the need.

The lowering of costs for products or services generally comes from initiatives such as group buying across several municipalities / entities for commodities, or through procurement agencies such as the Local Authority Services (LAS) as part of the Association of Municipalities Ontario for items such as electricity. The procurement group can play an important role identifying and pursuing opportunities for joint purchasing projects with other municipalities.

## Recommendations

The procurement function within Business Services focus on:

- Updating the over-all policy for procurement and revising processes as required from time to time, for example as IT systems are implemented
- Providing training on the policy and procedures.
- Providing assistance to department procurement initiatives as requested
- Periodic review / audit of a sample of procurements after the fact to ensure consistency with Township policy.

- Helping build the supplier interest/capability when vendor response to procurements is weak.
- Developing standing offers for goods and services required on a regular basis
- Developing / joining joint procurement projects with other agencies.

<b>Corporate Services</b>
<b>By-law Enforcement and Policing</b>
<b>Current Situation</b>
<p>By-law enforcement has been contracted out to Frontenac Municipal Law Enforcement Inc. as the service provider on an as required or complaint driven basis. The arrangement with Frontenac By-law Enforcement involves two contracts:</p> <ol style="list-style-type: none"> <li>1) By-law Enforcement Services (Noise, Parking, Property Standards, Zoning and other by-laws), and</li> <li>2) Animal Control Services.</li> </ol> <p>The cost of both contract agreements was budgeted at \$7,900 per month or \$94,800 annually in 2019. The By-law Enforcement Services contract has expired while the Animal Control Services contract expires on October 15, 2020.</p> <p>The Citywide Works Program was implemented in 2019 to track inquiries including a complaint component that includes by-law complaints. A formal Complaint Policy is currently being drafted.</p> <p>Loyalist currently purchases its policing service from the OPP at a cost of about \$2.5M per year. There is no police service board at the present time. The OPP are changing their governance model to a regional board which would have representation from the Township.</p>
<b>Issues</b>
<p>Key issues are the cost and effectiveness of by-law enforcement. The potential to move by-law enforcement in-house has been discussed. The OPP has not always been responsive to Township requests for service. The implementation of a Regional Police Services Board may improve this.</p>
<b>Analysis</b>
<p>According to Township staff's preliminary analysis, providing in-house enforcement would require the hiring of one full-time equivalent position at 35 hours / week. The advantages of in-house enforcement include:</p>

- 1) that there would be an additional 14 hours / week potential for an increased level of service at a slightly lesser cost.
- 2) The potential for increased revenue (e.g. dog tags etc.), and an additional staff person to assist in by-law review, public education etc. The annual financial benefit of hiring a staff member is estimated to be \$3,500 annually.
- 3) the potential to schedule after hour's coverage as time in lieu or setting different work schedule to cover evenings a few times each week.

The disadvantages include:

- 1) an increase in HR resources required (benefits, administration etc.).
- 2) the unknown cost of on-call and any overtime premiums (not taken as time in lieu) and coverage during vacations.
- 3) the requirement to purchase and maintain a vehicle and relevant equipment.
- 4) the challenges of providing 24/7 on-call services coverage during time off/vacation periods with one FTE.

The financial analysis of options needs to be expanded to consider the costs of providing a vehicle (about \$5,000 per year) and the cost of responding to calls outside normal working hours under both options, if that is the desired level of service. Noise By-law enforcement, in particular, generally requires evening and weekend work. The implications of the union contract need to be determined and considered, including such items as any on-call pay, over-time pay or restrictions on over-time. It would also be useful to discuss with the contractor the potential implications of expanding a new contract to meet the evolving needs.

The two options can only be effectively considered if the future requirements are clearly defined. How many hours of service are required? When will service be required? Given that there is some uncertainty (e.g. how frequently will noise complaints be received on the weekends?) it may be useful to identify the requirements (e.g. response to complaints as and when required) and then estimate a range of requirements (perhaps 10 to 20 weekend evening responses) and conduct the financial estimates based on the expected service requirements.

#### Recommendations

- The by-law enforcement contract be renewed month to month until a full analysis of the in-house option is completed, incorporating the issues noted above.
- Support the OPP effort to move towards a new governance / police service board model and monitor the cost and service levels once the OPP new governance model is put in place.

Economic Growth and Community Development Services
<b>Planning Process</b>
Current Situation
<p>The Development Services group processes applications for development permits including applications for changes to the Official Plan and/or zoning by-law, applications for approval of subdivisions, condominiums, site plans, Committee of Adjustment applications and support of Heritage Committee deliberations.</p> <p>The County, together with the Area Municipalities, is currently reviewing development, planning and engineering processes with the assistance of a consultant. This <i>Modernization of Development Processes</i> review is to identify opportunities to streamline processes and create practices that are innovative, entrepreneurial, transparent and consistent for all potential development. While not concluded, the review appears to be considering some useful concepts:</p> <ul style="list-style-type: none"> <li>• Developing a single software platform, perhaps the CityView platform partially implemented in Loyalist that all municipalities in the County could use to accept, track and process planning applications.</li> <li>• Establishing clear and consistent guidelines on the submission requirements for various types of applications.</li> <li>• Establishing clear and consistent guidelines on the requirements that will be imposed on development.</li> <li>• Establishing a facilitator that would be involved with critical applications in any of the area municipalities that meet some triggers (e.g. delays) based on clear principals and protocol standards.</li> </ul> <p>Loyalist Township is also currently reviewing its Official Plan and Zoning By-law and is aligning engineering and planning reviews for development review to avoid duplication and access to information available to both divisions. The Township is also developing the Amherstview West Secondary Plan and Community Design Guidelines and Standards.</p>
Issues
<p>The Township, like most municipalities, receives complaints that the planning process is too slow and / or too expensive. The Province mandates maximum review periods for most applications, but the timeframe begins when the applications are “complete”, and some complaints suggest the applications are often deemed “not complete” by staff. Other concerns suggest that some requirements for supporting information can be unnecessary, e.g. traffic studies as part of zoning applications, or requiring full infrastructure, such as sidewalks, while expecting ‘affordable’ housing.</p> <p>Staff undertake pre-consultation meetings with applicants where a report is provided following the meeting identifying all studies and plans that are required to be submitted with the application.”</p>

The County's Modernization of Development Processes review was initiated in part by the acknowledgement that navigating through the development processes in the County and lower tier municipalities can be very complicated and confusing. The complex planning process in turn hinders economic growth and affordable housing development.

Both the consultation process for this review and the County process noted that there are unnecessary costs and barriers in terms of the time taken for processing and the studies and reports that must be submitted, but add little or no value to the outcome. The approval processes must meet the requirements of both Provincial legislation like the Planning Act and the Building Code Act and Council approved by-laws and the Township Official Plan.

There are also suggestions that there may be a need for additional staff in planning.

### Analysis

The County wide Modernization of Development Processes review is an excellent initiative which will have the Township's cooperative participation in implementation of applicable recommendations. Still, it is important to remember that Loyalist Township staff and council members are responsible for the largest share of planning and development approvals. Most, if not all, residents will come to the Township for information, for guidance, or for additional compliance requirements related to planning and development application approvals.

Loyalist Township is also part of the Kingston Census Metropolitan Area which makes it unique from the rest of the County. Amherstview's population alone, for example, has increased by the same amount between the 5-year census period of 2011 and 2016 as Greater Napanee has over the 15-year census period since 2001. Although Napanee does have similar types of development applications, the other two lower tier municipalities generally do not. There is greater pressure therefore on affordable housing and encouraging economic growth in Loyalist.

There are two different types of issues. The initial focus is on the process – seeking quicker approvals and the elimination of studies or requirements that add little to the decision-making process or the value of the products. Beyond that is a more complex difference in perspective; a suggestion that standards should be reduced to encourage economic development, versus a recognition that the major new subdivisions and site plans will be with us for decades and there is only one chance to “get it right”. It is also important to note that the Province sets some of the planning policies through, for example, Provincial Policy Statements which the Township's Official Plan must conform with. The Official Plan in turn sets requirements which must be met when applications are processed. This in turn adds to the complexity of reviewing and approving applications.

The Township can wait and see what recommendations come out of the County wide review before determining whether additional steps are required within Loyalist alone. The review will likely examine and recommend actions related to timelines and existing bottlenecks for processing and obtaining planning and development approvals. The County review did identify that Loyalist Township takes longer than other municipalities in the County to process applications, so some improvements should be possible.

The adequacy of staffing levels is also a concern. The 2018 data used in the Planning Service Profile showed that the net cost of planning (after deducting the fees collected) was the highest per capita of the nine municipalities reviewed, and the highest per new residential unit started that year. The data also suggest that Loyalist is recovering only 19% of its costs as fees, the third lowest. Greater Napanee was lowest at only 1%, but most municipalities recover from 30% to 43% of planning costs.

If the County process does not achieve significant changes, Loyalist Township should consider the changes identified below.

#### Recommendations

- Continue with the Township's participation in the County's *Modernization of Development Processes* review and implement applicable recommendations.
- Address the following issues if they are not resolved in the County-led process:
  - Distinguish between type of development (e.g. residential, commercial) and customer type (e.g. private sector residential developer versus homeowner), rural location versus urban) in terms of the submission requirements and processes.
  - Review existing approval processes for the purpose of identifying and cataloging steps and identifying points where the bottlenecks exist and how they can be removed or reduced (part of County wide review).
  - Identify the major decision points in the process (e.g. what back-up information or studies will be required) and develop decision guidelines which Council can review, including guidelines for the pre-consultation process which Council is not directly involved in for particular applications.
  - Prepare simple pamphlets / checklists (digital and print) describing the different planning and development approvals requirements, what constitutes a complete application in various circumstances in layperson language. Pamphlets should be made available on the Township's web site.
  - Continue developing an e-permit system on the Township's web site.
  - Implement the on-line application process and application review/approval tracking. If the County does not proceed by Q2 2021, Loyalist Township should evaluate implementation in early 2022.
  - Expand delegated authority where it can speed up approvals.

- Participate in any facilitator service that the County wide review establishes to directly assist applicants navigate through the approval process – at least on a trial basis (one or two years).
- Review planning fees and costs with a review to improving the cost recovery ratio.

Economic Growth and Community Development
<b>Economic Growth Services</b>
<b>Current Situation</b>
<p>Economic growth received additional emphasis as a part of the 2019 reorganization and shares the name of its assigned Department along with Community Development (previously Planning and Development) Services. The organizational change was in part the result of the strategic planning process leading to the Strategic Plan approved by Council in April 2019. Commercial and Industrial Activity is a Strategic Priority identified in the Plan. Township Council has generally promoted an “open for business” orientation when it comes to economic growth.</p> <p>The Township collaborates with the County of Lennox and Addington in Economic Development. The County provides several related services including marketing and promotion, retention and expansion, data and statistics, site selection assistance and assistance to small businesses. The County has 2 dedicated Business / Community Development Officers under the Director of Community &amp; Development Services.</p> <p>With the County carrying out most of the day-to-day economic development activities, there is no dedicated Loyalist Township staff allocated to economic growth services. The Director of EGCDs; the Manager of Development Services (EGCDs), and; the Manager of Engineering Services (EGCDs) are supported by other staff as required. They each respond to enquiries to the Township and referrals from the County.</p> <p>The Township owns two business / industrial parks, Loyalist East Business Park (LEBP) and Taylor Kidd Industrial Park, developed to attract industrial growth. Loyalist East Phase 1 (approximately 40 acres) is fully serviced while Taylor Kidd (approximately 575 acres) has water service and sewage constraints and is more suitable for distribution and heavy manufacturing uses. LEBP has been attracting interest and resulting sales, and Phase 2 servicing will commence this fall.</p>
<b>Issues</b>
<p>Some concern was expressed that the County staff is located in Napanee and tends to think first about Napanee, recommending that businesses locate there, rather than in Loyalist. Another concern is whether the Township requires additional resources</p>

dedicated to economic development; whether or not the Township relies on the County program.

Perhaps of more importance to the success of economic development efforts is the tone or reputation the Township develops towards business. The key Township roles that influence its reputation is how it manages planning approvals, and whether there is Township infrastructure in place to support and encourage development; whether the process be initiated by contacting the Township directly, or through the County.

### Analysis

On investigation, it appears that the County has referred businesses to Loyalist when appropriate. The Township gains from the greater resources available from a County shared service approach, and the County as a whole can attract more development based on this scale. The Township should remain as an active and valuable partner with the County (and other member lower tier municipalities) and be more aggressive to ensure that its interests are well incorporated in the County's programs. It also needs to continue to provide support to particular opportunities raised by the County.

The Township has a significant investment in its two industrial parks, with substantial infrastructure to provide a range of opportunities for commercial and industrial development. They are a symbol of the Township's commitment and represent a vested interest in realizing development to produce a financial return and economic benefit. The Township has three sales in process and is investing \$1.3M in further servicing of the industrial parks.

One common point of view or perception advocated by some private businesses and developers is that planners tend to place onerous requirements and add excessive processing times in obtaining necessary approvals, which, in turn, hinders economic development. It is useful to note that this view has long existed in most communities, small or large, urban or rural. This perception is discussed further in the section dealing with Planning Approvals.

While municipalities generally can develop the infrastructure to support economic development, and the reputation to support it, they cannot generally ensure economic development, particularly if commercial and industrial development occurs. They can, however, recognize the opportunities that emerge and provide the support necessary to facilitate development.

Given that the Township has an economic growth role with three staff members at different levels that have responsibilities to support opportunities that come forward, and the county staff to assist in developing those opportunities, it is not anticipated that the amount of work required to provide such services justifies a full-time position. Instead it is suggested that the staff involved make facilitation of economic development opportunities a high priority when they emerge and continue to bring in additional resources as required when significant opportunities require support. For

the large part, the duties can be managed with existing staff resources in a co-operative manner.

**Recommendations**

- No changes are recommended at this time to the amount of resources or the placement of economic growth services within the Township’s organization.
- The Township should maintain its collaborative partnership with the County and ensure the Township’s priorities are incorporated in the County’s economic development programs.
- The County should be asked to prepare a quarterly report outlining its progress in economic development.

**Community & Customer Service: Recreation Services**

**W.J. Henderson Recreation Centre / Community Hub**

**Current Situation**

The W.J. Henderson Recreation Centre consists of 3 facilities – swimming pool, ice skating rink and library. Built over 45 years ago, the Centre has been a valuable asset in providing recreational services to a growing population, especially in Amherstview. The Centre also attracts users from the rest of the Township and from western Kingston, with about 1,200 users in 2019 being Kingston residents, representing 30% of all pool users and program registrations; 55% of the children’s Red Cross swimming lessons are non-resident registrations.

Today, the aquatics centre has deteriorated physically and requires substantial expenditure to extend its life. A feasibility study completed in 2018 found it would cost \$3 million to retrofit the existing pool compared to \$3.3 million to build a new one of similar size. Note that this is simply to replace the existing pool at the existing size and items such as the costs for upgraded changerooms, the inclusion of a therapeutic pool, and other items being considered were not included in this study. The cost of the new pool may, of course, change depending on future design alterations and inflation in construction costs over time.

The new aquatics centre is planned to be part of a proposed multi-functional Sustainable Community Hub, which will include the 8-lane pool with a separate therapy pool and fitness centre; as well there will be several other improvements. The Community Hub is also to contain a new municipal office to replace the existing accommodations in Odessa.

The Township had submitted an application to obtain grant funding under the Community, Culture and Recreation stream of the Investing in Canada Infrastructure Program (ICIP) but was not successful. Nevertheless, the Township still plans a pool replacement project given the age and condition of the pool. Meanwhile, staff will

continue to engage potential community partners and neighbouring municipalities as part of the grant application process. The City of Kingston Council has agreed to make an up to \$1.5 million financial contribution towards the construction of the Community Hub. The City of Kingston has also been supportive of the Township's investment in a new aquatics centre, recognizing that there is mutual benefit for residents in both municipalities. The Township's aquatics programming would mirror the City of Kingston's programming with Kingston users paying the same usage fees.

There is also speculation that the federal government will be introducing an infrastructure economic stimulus plan similar to the post-2008 recession "Economic Action Plan" once the COVID-19 pandemic restrictions are lifted. Like the earlier Plan, the funding would be targeted at 'shovel-ready' construction projects to generate new employment after the COVID-19 pandemic finally ends. This may present a further opportunity to obtain funding for the Community Hub project, or some part of it if the design is developed.

### Issues

The following summarizes the key economic growth issues that emerged from the SWOT meetings and other consultation with staff.

- Whether or not the Township's ICIP application will be approved will have a significant impact on development of the Community Hub in terms of the timing and scale of construction. It was determined subsequent to the SWOT sessions that funding was not approved; however there may be other funding opportunities in the near future.
- Some concern was expressed over the increasing shortfall in revenue to cover operating costs. In particular,
  - Any Increase in user fees needs to consider the impacts of such increase on seniors and low-income families.
  - There were questions around whether or not services should be provided to Kingston residents without any contributions to offset operating costs.
- Concern was expressed that the Centre may be losing its share of the 25 to 40-year-old age group residing in Loyalist Township (Amherstview) but using Kingston's recreational facilities.

### Analysis

The proposed Sustainable Community Hub can play a significant role in the evolution of the Township and, in particular, Amherstview as a livable, desirable community including for young families and seniors; as well as in supporting business growth. The Hub would allow the Township to enhance its identity as a progressive community and not simply become a suburban commuter community of Kingston.

A key part of proceeding with the Community Hub was securing ICIP funding or possibly a future 'shovel-ready' stimulus program. Since the ICIP funding was not

approved, the Township can still go ahead with a new pool. The issue facing the Township is the uncertainty over whether or not future funding may be available under a potential ‘shovel ready’ program which in turn will determine if the Township can proceed with the Community Hub or just the replacement of the aquatics centre. If the pool proceeds alone, it is important that its design be compatible with future development of the entire hub, and the development of a design for the hub that can be built in stages would allow a series of smaller components to proceed as funding is available.

On the operating side, Township staff have recently examined the risks of increasing non-resident fees for recreation service; recommending against such increases. One of the arguments against higher non-resident fees was that such increases would result in a decline in registration revenues and that the revenue losses would be greater than any operational savings. It is also noted that the City of Kingston’s contribution towards the capital cost of the Community Hub is subject to the Township’s agreement that user fees and registration times would remain the same.

**Recommendations**

- Continue with current efforts by the Community Hub Steering Committee to obtain potential post-COVID funding and in securing other partners including the private interests (e.g. naming rights).
- Start the design process, both for the pool replacement and for the larger community hub project (designing a series of smaller projects) to ensure the ability to access funds that require ‘shovel ready’ projects, to ensure the pool project is compatible with the larger project if it must proceed alone, and to reduce the time required to complete a project.
- Continue to monitor operating revenues and costs based on appropriate performance measures (e.g. costs as a % of revenues).
- Instead of imposing higher fees for non-residents, approach the City of Kingston to share in the operating costs of the Aquatic Centre in proportion to Kingston resident users.

**Community & Customer Service: Public Works**

**Solid Waste Management**

**Current Situation**

The provision of solid waste management includes collection from residential, commercial and institutional properties, operation of two landfills (Violet Landfill and Amherst Island Landfill), diversion of materials from landfill (residential composting options, leaf and yard waste collection, a hazardous waste material disposal facility, and Free Large Item Disposal Opportunities), administration, procurement, and the

supply of Pay-as-you-throw bag tags, residential containers and the medical exemption bag tags.

Staffing consists of one supervisor and two site attendants at Violet during summer, with one supporting Roads Maintenance during winter; Amherst Island has a site attendant for 10 hours per week. Site attendant duties include: Customer Service (confirm residency, enforcement of acceptable materials list, create weigh scale tickets, and accept payment for disposal), site maintenance (collection of loose garbage, cleaning of buildings, grass cutting) compaction and covering of garbage.

Loyalist Township recyclables are delivered to the Kingston Area Recycling Centre (KARC) by the collection contractor. Loyalist Township has an agreement with KARC where a portion of the capital and operating costs are paid by Loyalist Township. A portion of the revenue generated by the sale of the recyclable materials offsets the cost of processing.

#### Issues

The Ministry of the Environment, Conservation and Parks has announced pending changes to the Blue Box program starting January 1, 2023 and ending on December 31, 2025. The exact details of the transition are not known but the intention is for it to remove the cost of the blue box program from municipalities. Exactly how the program will be transitioned and implemented is not known, including the future municipal role (if any). The Ministry has committed to provide a draft Blue Box regulation under the *Resource Recovery and Circular Economy Act* in the Summer of 2020 which would lay out the ground rules for what this new system would look like. This will likely be delayed by COVID-19.

Loyalist Township does not have an option for residential property owners to participate in organics diversion if they do not want to utilize backyard composting.

#### Analysis

Continued investment in curbside recycling equipment and programming is focused on the short-term needs and actions, such as extending contracts or stretching existing equipment until the roll out of the new program is known is the approach most municipalities are taking.

The potential to increase diversion at the residential levels exists with the development of an organics composting program. Source Separated Organics and separate collection and diversion to a treatment facility, such as that operated by KARC, could extend the life of the existing landfills and reduce harmful greenhouse gasses. The anaerobic breakdown of organics in landfills produces methane gas which is 20 times more harmful to the ozone layer than carbon dioxide. Neither landfill has a methane gas capture system; this would be an expensive investment.

Performance measures such as the number of participating properties, percentage of waste stream diverted, and the use of waste audits to determine the potential material landfilled that could be diverted, would be useful.

**Recommendations**

- Continue with current recycling contracts until such time as the implementation plan for the transition of the blue box is defined and more informed decisions can be made.
- Develop a staged program of waste audits to focus on key large segments of the waste stream for the potential for increased diversion from the landfill.
- Explore options for increasing or enhancing external partnerships to cover organics diversion; if it can be achieved at a reasonable cost.

**Public Works**

**Fleet Services**

**Current Situation**

Loyalist owns and operates about 132 vehicles and pieces of equipment (excluding Emergency Services, which maintains its own vehicles), with 6 additional units to be added in 2020. They are maintained by two mechanics, to some extent by their operators, and by contractors as required. The foreman for the operation has retired, and a new supervisory position will have responsibility for Public Transportation (Ferry and Transit) in addition to Fleet Services.

The Fleet units are listed within CityWide, and maintenance activities can be recorded as Work Orders when they occur. The vast majority of the work required is on the Public Works and Utility vehicles, so the location of the mechanics at the County Road 6 Works garage is appropriate. Facilities are being improved as part of the planned renovations.

The Township does have some reserve funds for Fleet Services, they are included in the overall Capital Reserve Fund and are not sufficient to replace the current fleet.

**Issues**

Vehicle retirements are generally based on the expected period of service and adjusted based on the actual condition or maintenance costs of individual vehicles. Vehicle charge out rates recover capital costs, but the vehicle reserve fund is not sufficient, and some replacement vehicle purchases are included in the capital budget. Replacements tend to be of like vehicle type, without an analysis of changing requirements or evolving vehicle types. There are no “pool” vehicles used by a number of users as required. There is no systematic consideration of options to lease or hire vehicles, particularly those with lower hours or km of service. There are a

number of traditional practices used by Fleet, but there is no written policy or procedures.

### Analysis

The Fleet operation has generally met requirements but may not have optimized results. An improved policy position would assist in this regard, as would creation of a Fleet Replacement Reserve. The policy would need to address:

- The user charges policy, generally all costs related to vehicle operation, should be recovered from users, either as part of a monthly charge for vehicle availability (suitable for vehicles dedicated to a single person and a single task) or an hourly charge (suitable for shared vehicles or vehicles charged out to multiple work orders). The recovery would capture capital costs (including modifications after purchase to make the vehicle ready for intended use), licensing costs, insurance costs (or a risk management charge for self-insurance), maintenance and fuel costs (if not paid by the user department) and a “management” fee to cover the costs of Fleet involvement in managing the fleet.
- With respect to the operation of the Fleet Replacement Reserve, the reserve generally receives all user charges related to capital costs and funds the acquisition of new vehicles to replace those retiring. The acquisition of new vehicles is generally the responsibility of the user department (budgeting and gaining approval for the funds required), and equipment upgrades are generally funded by the user department.
- Options to lease vehicles or equipment should be considered. This is generally worthwhile for specialized (expensive) low use units that are available in the community (perhaps loaders or graders), and occasionally standard units such as sedans, SUVs or pick-ups when servicing or warranties can be included.
- Departments will sometimes seek to retain vehicles that have been retired and replaced, to function as “retirement spares” during downtime of similar vehicles, or sometimes as a surreptitious expansion of the fleet. The user charge policy needs to recognize this and continue regular fees for use of the vehicle, including recovery of capital representing the foregone sale revenue.

### Recommendations

- Adopt a Fleet Replacement Reserve policy and ensure vehicle and equipment users contribute sufficient funding as they use vehicles to cover vehicle replacement requirements.
- Develop a policy for operation of Fleet Services covering such areas as cost optimization, maintenance approach, and lifecycle replacement approach. The approach to new technologies, including hybrid, electric or other alternative fuels should be considered.

- Fleet should periodically review the market for major or specialized vehicle categories, to ensure the type being purchased has the strongest business case, considering the potential for multiple / year-round uses, improved functionality, etc. The reviews should also consider whether purchase is the best option, or if leasing or hiring should be considered.

Facilities / Community & Customer Services

**Heritage Properties and Museums**

Current Situation

Loyalist Township has acquired three heritage properties from the Fairfield Gutzeit Society; more specifically - Layer Cake Hall, the Bath Town Museum, and the Fairfield-Gutzeit house, with its valuable historic collection. This is in addition to other heritage designated properties owned by the Township including Wilton Hall, the Babcock Mill, Neilson Store & Museum and Fairfield House in Fairfield Park.

The responsibility for the physical maintenance of these facilities rests with the Facilities Supervisor, and the Facilities Division in the Community & Customer Services Department. There is no programming responsibility for any of the facilities at this time, although the Township did place a summer student at Fairfield House.

The Heritage Committee is a statutory committee of Council established to advise on local heritage matters and to assist Council in carrying out its heritage conservation program. The Heritage Committee need only be involved in the files if there are issues of an architectural nature or regulatory approval are required for renovation or development. However the Heritage Committee could play a useful role in developing a strategy for the properties and managing the artifacts and collections.

Of the three most recently acquired properties, Layer Cake Hall, the Bath Town Museum, and the Fairfield-Gutzeit house, only Layer Cake Hall is unique in terms of current use in that it is the location of the County Public Library in Bath. The other properties are, or were, operated by the various societies or associations and may have charged admission fees or membership fees as a means of fundraising.

Issues

The Loyalist Township Strategic Plan has several Priorities, Objectives and Key Initiatives that touch on this issue, including:

- External Communications Priority – Objective: Promote a Loyalist Community Identity.
- Financial Priority – Key Initiative: Maximize opportunities for grant funding.
- Infrastructure Priority – Objective: Long-term viability of maintaining cultural & heritage assets owned by the Township – Key Initiative: Develop cultural and heritage asset strategy.

The heritage properties are key components of the Loyalist Identity; while this does not mean that the Township must retain ownership of the properties, there is recognition that the Township must preserve and protect them. The reason that the Township exercised its rights to these properties was to stop them from being sold to private interests.

Curators for many of the properties / museums have been students hired for the summer tourist season; this does not provide consistency or long-term planning of the assets. The Strategic Plan – Infrastructure Priority points to a gap in that no way forward for cultural and heritage assets have been articulated. There is no curator for these properties and no shared vision of how they are to be managed and preserved.

There are several specific communities of interest for the many properties owned by the Township and the community is still closely involved year-round in the planning of assets, developing displays, identifying artifacts, gathering information etc. The different communities are listed below.

- Fairfield Homestead Heritage Association
- Bath Museum Committee (which operates the Bath Museum in the summer), and
- Neilson Store Museum and Cultural Centre Museum Board

Finally, Loyalist Township has committed that “staff will begin developing a business plan to ensure the preservation and protection of the three buildings and contents (Layer Cake Hall, the Bath Town Museum, and the Fairfield-Gutzeit house)”.

## Analysis

The Township has been planning to conduct a condition assessment for all its buildings as part of its Asset Management planning. It will be particularly important that these buildings be included, given their age, and the potential costs of maintaining the buildings consistent with their heritage character.

The Bath Library located in the Layer Cake Hall, is the only historical building occupied year-round. Although use as museums is possible, it tends to be expensive relative to the level of activity generated. Some creativity will be required to identify appropriate uses – perhaps in concert with other heritage structures owned by the Township and / or the County. The Bath Library also has some serious structural issues that need to be addressed.

Funding is of course a major consideration in the operation of cultural and heritage assets. Charitable status and the limitations that trust agreements place on the transfer of assets means that these assets (properties and collections) are not easily transferred, governed or financed. Municipalities, which have charitable status by default, often become the holder of various heritage assets over time. This can be a

significant financial issue to be funded from the tax base due to the high costs of maintenance, regulations and limited revenue generating opportunities.

The lack of a common approach to curating the many cultural and heritage assets of Loyalist Township can lead to challenges such as competition for operational funding, grant funding, summer student funding, benefactors and additions to collections.

The County has some similar buildings and there may be opportunities to co-operate with the County, either moving some assets to the County, or sharing some resources such as a curator, maintenance skills and processes, etc.

There is an interest in tourist promotion as an economic development opportunity, and one or more of the buildings could play a role in encouraging tourism, but likely only on a combined basis, such as the Guided Walking Tour promotion, as none of the facilities is large enough to be a significant stand-alone attraction.

The development of proposals and applications for both capital and operating grants is a key component of municipal operations. A knowledge of, and an ability to respond to, these processes, varies by groups; every effort should be made to make the successful attainment of funding possible. This may mean that municipal involvement is a requirement.

Lastly, the ability to fundraise can be challenging, especially for smaller groups because they are not only limited to reach a broad group, but also the logistics. Matters such as, how do we incorporate into our web site an ecommerce component to accept donations, what about credit card processing rates etc. The Ottawa Community Foundation is a very successful model used by many museums and trusts to streamline the process of fundraising as well as giving access to professionals for the management and investment of proceeds and gifts.

A fact-finding interview was held with the County of Lennox and Addington, Director of Community & Development Services, as well as the Artifact Curator of Lennox & Addington County Museum & Archives. The County has experience with heritage properties, the curation of historical collections, archives, revenue generation from these assets and programming. For instance, the County operates Macpherson House which functions as additional gallery space for the Lennox & Addington Museum & Archives and is, itself, a “piece” in the collection. It has been restored; while programming takes place at the site it is external to the building and is held in a tent set up on the property.

As this section has identified, there are numerous “possibilities”, but the advice from the County is to determine “what Loyalist Township wants to be?” – curation, programming, archives, revenue generation, etc. Curation of a collection requires expertise, funding, time and space. Revenue generation through wedding rentals, corporate events etc. requires an investment in branding, marketing and catering capacity; whether it is kitchen renovations or contract services. The County views its role in its museums and archives as one of community building, enhancing the social fabric; not solely revenue generation. The focus is on creating experiences; having

people return multiple times, not outwardly focused on tourism. So, there are no initiatives such as tourism “passports” or programs. The County programs do not operate year-round but from July to August for 3 days per week. Prince Edward County uses a model of a County Chief Curator that oversees numerous other sites.

### Recommendations

- Complete a condition assessment of Township properties including the three heritage buildings to determine the necessary repairs required and categorize the repairs in order of priority:
  - Life/safety
  - Structural
  - Heritage designation / architectural preservation
  - Required for public use of building (including accessibility)
- Assess staffing requirements as part of the condition assessment.
- Conduct a study to determine “best use” of the three properties and other heritage properties owned by the Township or the County. The process should involve:
  - A Steering Committee of key stakeholders, including the Heritage Committee and County
  - Market studies of potential uses with business analysis for revenue or enterprise driven options
  - Consideration of legal requirements (limitations of trust agreements)
  - Funding required from taxpayers
- The study would develop a Cultural and Heritage Strategy with a business plan for all Township owned historic properties, including those such as Layer Cake Hall, Bath Town Hall, Fairfield Gutzeit House, Wilton Hall, the Babcock Mill, Neilson Store & Museum and Fairfield House in Fairfield Park. The strategy would:
  - Explore the feasibility of establishing a Curator or single committee (e.g. Heritage Committee) to manage all the heritage properties and to coordinate all activities, perhaps at the County level
  - Review the role and mandate of the Heritage Committee
- Create a Loyalist controlled non-profit Heritage Community Trust Fund for donation and grant purposes”.

Public Works
<b>Amherst Island Ferry Service</b>
Current Situation
<p>The Amherst Island Ferry Service operates between Millhaven wharf and Stella wharf on the Island and is operated by Loyalist Township on behalf of the Ministry of Transport (MTO) in accordance with an operating / funding agreement. The ferry leaves Stella on the hour every hour from 6:00 A.M. until 1:00 A.M. The ferry leaves Millhaven on the half-hour from 6:30 until the last boat at 1:30 A.M. Fares are payable by cash or cheque at the time of boarding or from a book of 25 round-trip tickets. The ferry transports approximately 300,000 passengers and 145,000 vehicles to and from the Island each year.</p> <p>The ferry service is subsidized approximately 87% by MTO with the remainder of the costs collected in on-board fares. Fare collection has been suspended during the COVID-19 process but generates \$400,000 per year over the last two years when fares are collected.</p> <p>Both wharfs are undergoing a \$51 million overhaul in preparation for the arrival of a new electrified ferry, which is costing another \$60 million. In November 2017, the Province awarded the design-build contract to Damen Shipyards (Netherlands) for the Wolfe Island and Amherst Island ferries. The new ferry will be able to transport 42 vehicles and 300 passengers. The new ferry was expected to be in operation mid-2020. A new operating agreement with MTO will be required once the new service costs are confirmed.</p>
Issues
<p>The following summarizes the key issues:</p> <ul style="list-style-type: none"> <li>• Since the ferry ends up on the Island overnight, there is the issue of how staff can return to the mainland at the end of their shift if the person resides on the mainland.</li> <li>• The current method for collecting fares by cash or cheque is outdated and inefficient. It does not allow for fare collection without contact between the purser and at least some customers, so fares are not being collected now.</li> <li>• The small crew size (5 for each shift) has limited slack with respect to providing relief or replacement during holidays or sickness with licensed mates. There is also a concern about succession planning especially for captains and mates.</li> </ul>
Analysis
<p>The new electrified ferry, together with the upgraded dock facilities, brings a high-profile service to the Township in terms of the application of innovative and</p>

sustainable technology. The introduction of a leading-edge ferry service provides an opportunity to also modernize support functions like fare payment. The current COVID-19 pandemic is another reason for developing a payment system which reduces or even eliminates the need for human contact. A technology-based system would also significantly improve the convenience for ferry passengers. Even if a small number of users escaped payment, the loss would be much lower than the current elimination of fares.

The staffing process has been challenging. It has been difficult to recruit when the ferry docks on the island. This makes it difficult to attract people who live on the mainland. The new Damon Road ferry includes a crew mess and day room with a toilet which may be used for overnight accommodations, which could help address this. It is also challenging to recruit for the skilled positions, and a training program aimed at existing staff is important.

The provision of ferry services is being managed effectively and efficiently; the new boat /dock facilities will further enhance the operations. There will be a need to update the operating agreement with the MTO; this could be a good time to address any outstanding issues.

**Recommendations**

- Analyze the potential of converting the crew mess and day room to provide overnight accommodation before or after a shift for staff not living on the island.
- Establish a new fare collection and passenger reservation system (e.g. a RFID system, like parking garages and transponders like 407).

**Public Works**

**Transit Service**

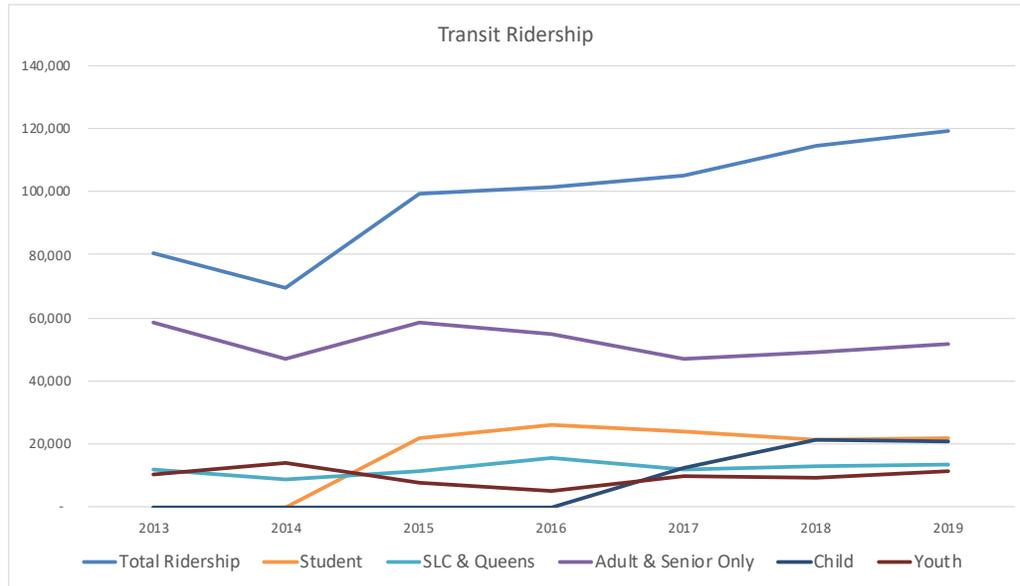
**Current Situation**

Loyalist purchases transit services from the City of Kingston, providing hourly service from Amherstview to the Cataraqui Centre in Kingston from 6 a.m. to 11 p.m. The service costs about \$650,000 per year and serves about 137,000 passengers per year (far fewer during COVID-19) recovering about \$108,000 in revenues. Passengers are able to transfer to other Kingston bus routes without paying additional fares.

As shown in the graph below, ridership has been increasing slowly over the last six years, with adult ridership largely stable or declining and student and child ridership growing. It has declined substantially during 2020, but that is thought to relate largely to COVID-19 and is unlikely to be permanent.

Loyalist does not provide any dedicated accessible transit service, although all buses are able to accommodate wheelchairs if the person can reach the bus stop (can be a problem in winter).

### Transit Ridership in Amherstview



### Issues

Hourly service does not meet the needs of many residents. As a consequence, most residents use cars for regular travel; transit users are predominantly those without cars. There are some employees with regular hours that find the costs of transit attractive, but the number has been declining and most users are students, either in secondary school or university.

In an effort to encourage ridership and serve disadvantaged populations, fares have been reduced or eliminated for many users with the result that the average passenger pays less than 80 cents per ride as students travel for free. The Township only recovers 17% of the costs of providing transit from users, and the balance, after provincial gas tax funds, is charged to property taxpayers within the transit area – which, in essence, is Amherstview. Other Township residents do not pay to support the service.

In order to minimize walking distances to transit stops, Route 10 (which serves Amherstview), follows a long and windy route with two one-way circles.

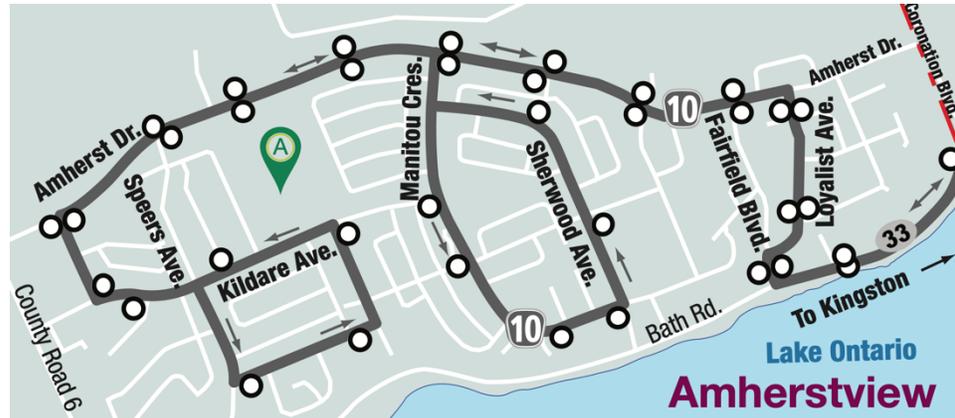


Figure 1 From the Kingston Transit web site

The result is a route that can barely be covered in one hour; frequently leading to late or missed trips, leaving passengers late – or stranded.

The Ontarians with Disabilities Act, 2005 requires municipalities who provide transit service to provide accessible service at the same price. The transit service accommodates some disabled persons some of the time, but not all, and there is no dedicated accessible service.

There are some residents outside Amherstview who want transit service to their communities. Service to Odessa and Bath has been mentioned; with an aging population transit service might help some residents stay in their homes.

Alternatives such as demand responsive transit, like the small vehicle service provided by Deseronto Transit, were mentioned as a potential approach.

## Analysis

Public Transit service has some very strong tendencies.

- The cost and effectiveness of transit are heavily influenced by the density of the community served – the higher the density (Toronto, Montreal, New York) the higher the ridership and the lower the cost of providing a ride; the lower the density, the higher the cost of service and the lower the ridership.
- The environmental advantages of transit depend upon the ridership levels. A full bus uses much less fuel than the same number of people in cars. But with less than 10 people on a bus, it uses more energy than the alternatives.
- Lower fares will generally increase ridership, but better service (increased frequency and improved reliability) will increase ridership more than an equivalent expenditure on reducing fares.
- The cost of transit is largely governed by the hours of vehicle time in service. A smaller vehicle will reduce costs, but by much less than the reduction in

vehicle capacity. If an hour of 40 ft. bus service costs \$120, an hour of mini-bus service (given similar wage rates for operators and mechanics) will be about \$100.

It is therefore not unexpected that transit service in Amherstview is less productive than service in Kingston generally. Kingston recovers about 27% of its costs from user fees, while Loyalist recovers only 17% of its costs. Service to the smaller communities would be much more expensive than service in Amherstview.

The extension of reduced fares (e.g. children, secondary and university students have received free transit passes recently) has resulted in increased usage but has caused fare revenue to decrease from a high of \$100,565 in 2015 to only \$66,429 in 2019. Adult ridership has decreased by a small amount over this period.

Increased frequency is desired by users as hourly service is generally not attractive. This was tried in the past with a trial of a 30-minute service – requiring two buses on the route instead of one. However, this doubled the costs of service without providing a substantial increase in ridership.

Ridership might be improved by changing the route so that it can be completed within the hour regularly, resulting in improved reliability. This is challenging given the street layout; however, a single loop system, using Upper Park Road, Briscoe, Manitou Cres W, Kildare, Pratt and Amherst Dr might accomplish this, giving a shorter ride for many and a more regular, reliable service. The current double loop system does allow busing between locations in Amherstview without going into Kingston but does result in unreliable service for commuters. It would be possible to have two routes, one circulating within Amherstview and one providing the connecting service to Kingston, however that would increase costs again, at a time when ridership is declining.

There has also been a much-reduced ridership during COVID-19, and this is likely to continue for the rest of 2020 if not longer. The hours of service were reduced, eliminating some evening service and non-peak daytime service. Complaints resulted in restoration of some service, and an ongoing analysis of ridership by hour is required to determine what is appropriate.

The suggestion was raised of using a demand responsive service like that in Deseronto for areas outside Amherstview. The demand responsive service in Deseronto was only introduced in January 2020, so it is difficult to be sure of its capabilities, or the associated costs. It cost Deseronto \$427,000 per year (2018) in order to carry 3,000 trips, much less than the volume carried in Amherstview and a cost of \$130 per trip! Ridership increased to 3,900 in 2019. Deseronto Transit does recover \$22,000 from the other municipalities it serves, and \$53,000 from the provincial gas tax.

Deseronto uses 16 passenger buses, one of which is equipped to provide wheelchair accessibility. Deseronto is a relatively compact town, similar to Amherstview, with a

much smaller footprint than Loyalist. However, Deseronto Transit does provide service to a number of adjacent communities, including Napanee and Picton. The fare schedule varies based on user category and the trip. For example, trips within Picton or Napanee cost \$3.50 for an adult, similar to the cost of the current service in Amherstview, while trips between Napanee and Deseronto cost \$5.50 and trips from Napanee to Belleville cost \$13.25. With Bath and Odessa 10 to 12 km from Amherstview, a comparable fare would be about \$5 to get to Amherstview and taking the Route 10 bus into Kingston would add another \$3.50.

Deseronto Transit provides service between 5 a.m. and 9:30 a.m., between noon and 6:30 p.m., and between 8 p.m. and midnight. Implementing similar gaps in the morning and evening service could be considered for Route 10.

The current service in Amherstview costs about 50% more than Deseronto Transit but carries 30 times more riders. In considering the Deseronto approach it is clear that it is not an alternative to Route 10, but it could be considered for the rural area if residents want transit service bad enough to pay those costs.

There may also be an option to purchase service from a private operator. It is likely that the Amherstview service to the Cataraqui Centre could be provided at a lower cost per hour than the City of Kingston currently charges; however, that would leave passengers to pay a second fare when transferring at Cataraqui Centre to head elsewhere in Kingston, such as to work or university. This approach would only be of benefit if the cost reduction was at least as much as the fares collected, so the new service could be provided to residents at no cost. There may also be some loss of goodwill with the City of Kingston if the Township withdraws from the current, relatively favourable, agreement.

A private contractor could also provide lower cost options to extend service to Bath, Odessa and the rural areas. However even the cost of contracted service would be very high, likely running between \$20 and \$50 per trip (depending upon the distance and volumes of users). A Township wide demand responsive system would likely be more expensive and could approach the cost of the Deseronto system (\$130 / trip). If transit service to the smaller communities is deemed essential, it may be more useful to encourage a taxi or Uber-like service by offering a subsidy at perhaps 50% of the fare, like Innisfil does. This would ensure residents truly value the service by paying a fare that relates to the cost of the service provided. Ride costs would vary as would the subsidy amount.

An alternative that could improve transit service outside Amherstview would be the development of a Park & Ride lot along Rote 10, perhaps as part of the new community hub. This would particularly help residents who work or study in Kingston, and would also improve the transit cost to Amherstview residents to the extent it increased ridership.

Loyalist has considered providing a parallel accessible service for the disabled in Amherstview similar to the Kingston Access Bus. Route 10 and Kingston Transit generally have made many improvements over the years that made conventional transit much more accessible to many disabled individuals, including those using wheelchairs or scooters. However, this is not considered adequate under the Ontarians with Disabilities Act. A staff report suggests there are approximately 52 residents who may use such a service. The cost of the service could be as much as \$600,000 per annum, or \$11,500 per user. The average cost was estimated at \$54 per ride, compared to the \$4.81 per average trip on the current service. However, many of the people that could use the service currently have other approaches to meet their needs. Some drive, while others seek rides with family or friends, and some use the current Route 10 to meet their needs.

Staff have approached Kingston Access Bus recently to see if they would expand their service to cover Amherstview, and they are not able to do so as their facilities are used beyond capacity already.

Deseronto Transit would be another potential operator as they do provide accessible service in their area. However, they are a considerable distance from Amherstview and there would be a lot of cost in deadheading to and from calls in Amherstview. Accessible taxis operate in Kingston and could also serve this market.

A private operator could also provide the service.

The implications of failing to meet this requirement could include an audit by the Accessibility Directorate of Ontario, starting a process that would likely take two or three years but might eventually force the Township to provide a service.

The lowest cost approach to implementation might involve:

- a) Establishing criteria for the issuance of an Accessible Transit Pass that requires residence in Amherstview, and a clear inability to use the conventional transit service most of the time (e.g. inability to use during or after a snowstorm would not qualify).
- b) Establishing a process for people to apply for Accessible Transit Passes, with a review to ensure the qualification criteria are met.
- c) Suggesting Accessible Transit Pass holders use accessible taxis or other services as required.
- d) Providing compensation to Accessible Pass holders who submit receipts for trips taken during the hours of service provided by Route 10, reducing the cost to the level of the transit fare.

Containing costs will require strict adherence to the criteria.

In summary, note that it is very difficult to remove transit service once it has been provided, People make decisions about where to buy houses and where to live

based on the services available, which makes it very hard to remove a service they use, regardless of the cost borne by other people in the community. Service should only be extended when there is a sound business case, supported by a clear demonstration that the taxpayers who will support the service are willing to do so, knowing the implications.

**Recommendations**

- Do not extend the transit service to areas outside Amherstview as there is no business case for doing so.
  - Notwithstanding the above recommendation, if there is clear interest from residents outside Amherstview for transit services,
    - determine the expected cost of both conventional and specialized service in consultation with third party providers, and
    - ask all residents of the areas in which service is to be expanded if they support creation of the service given the expected impact on their property taxes.
- Revise the Route 10 route in consultation with Kingston Transit to reduce the time taken and improve reliability.
- Examine ridership by run (by the hour) on a regular basis. Consider reducing the hours of operation of Route 10. Service could be restored, run by run, as ridership justifies it.
- Consider implementing the lowest-cost approach to accessible service as described in more detail above.
- Consider developing a Park & Ride facility in Amherstview to accommodate residents of Odessa, Bath and the rest of the Township.

**Public Works**

**Winter Road Maintenance**

**Current Situation**

Loyalist Township is responsible for plowing both County and Township roads. There are 10 plow routes that cover all roads including Amherst Island. The service is much better than the Minimum Maintenance Standards set by the province (start residential streets after 10 cm of snow has accumulated, complete in 24 hours, and start most rural roads after 8–10 cm of snow and complete in 16 to 24 hours). In practice, all routes are generally started at around 5 cm (the trigger for most County roads) and completed in less than one shift. The County roads on each route are generally plowed first, but there are varying amounts of County road in each route, so completion times do vary for similar roads. Council recently approved the purchase of an additional “combo” truck (salts and plows at the same time) to ensure the level of service is maintained.

<b>Issues</b>
<p>The 8 plow routes serving the mainland are roughly equal in length, but do not have similar proportions of various road types. Service is better than is required by provincial standards. With sufficient staffing for all routes on two shifts, cost reductions are possible.</p>
<b>Analysis</b>
<p>Having all roads maintained by the same municipality is a best practice. Costs could be reduced by moving to unbalanced shifts. This would involve establishing some routes that do only County roads (generally arterials) and Township collectors. They would be staffed on both shifts and plowed / salted whenever snowfall starts. A second set of routes that include only lower priority roads would only be staffed on one shift and would be plowed (and salted on hills and curves) by that shift, likely working on days.</p> <p>This approach would allow elimination of three or four positions during the winter, which could save about \$75,000 to \$100,000 over the winter period. This approach could require additional seasonal staffing in the summer period and may receive objections from the Union. Savings could be expanded further by eliminating the extra route and reducing service levels closer to provincial requirements. While feasible, this approach would reduce current service levels.</p> <p>An alternative approach would be to redesign the routes to ensure all routes (other than those on the Island) have more or less the same quantity of arterials and collectors. This would ensure all roads are completed in about the same timeframe, but ensure all arterials and collectors are maintained immediately after a plow run begins.</p> <p>Given the recent decision to increase staffing and vehicles to accommodate another plow run, it appears that Council has chosen to maintain current high service levels but modifying the routes would improve the outcomes at the higher service level.</p>
<b>Recommendations</b>
<ul style="list-style-type: none"> <li>• Redesign the plow beats to include a roughly equal proportion of arterials and collectors in each route.</li> </ul>

<b>Corporate Wide</b>
<b>Budget Process</b>
<b>Current Situation</b>
<p>The Corporate Strategic Plan called for a multi-year operating budget and a 10-year capital plan. The Finance Department has made significant progress towards these</p>

targets, and the 2020 budget includes a summary of an operating budget forecast for 2021 and 2022, breaking down expenditures by department and between salary and other costs. It also contains a summary 10-year capital plan and a forecast of related debt costs.

#### Issues

The operating budget forecast does not contain much detail – either a breakdown of expenses by service, or a list of the items expected to change each year. The latter would be most useful to Council, helping it to understand what changes are foreseen, and therefore what changes will have further impact on the budget if implemented over the planning period.

The capital budget forecast does not contain a list of projects, even major projects, or a list of expenditure by category (e.g. “road resurfacing” even if the particular road links are not identified). It is also not clear, for example, what the assumptions are concerning the development of the community hub.

#### Analysis

The asset management program has taken major strides, recording the significant assets and the condition of those assets. Given a set of assumptions, this can produce the major inputs to the capital budget. It would be useful to list planned projects for the current budget year and the following year. While the inclusion of particular projects could change when the following year becomes the current year, it would give both staff and the community an opportunity to plan and anticipate.

Beyond that, listing should be limited to major projects, perhaps those expected to cost more than \$1 million. The long-term capital budget should also have a way of showing conditional projects – for example the development of the community hub. This is an important project that will have a significant impact on the municipality’s finances, though it is not yet clear what the scale or timing of the project will be, given the dependence on grant funding that has yet to be finalized. However, the capital budget forecast is the best way to determine the Township’s ability to support the project; other projects need to be planned with recognition that this project will consume some capital expenditure capacity over the next few years.

The operating budget forecast could usefully allow Council to understand planned new expenditures and to influence those plans – perhaps adding a new change or deleting a planned change. Decisions related to future years would not be final; they would have to be confirmed when the future year becomes the current year, especially after an election year, but more detailed future plans would allow staff to plan and prepare in the expectation those changes will likely be confirmed. This would allow the Township to plan implementation of new projects over a number of years, perhaps, for example, planning the implementation of the Strategic Plan over a number of years.

<b>Recommendations</b>
<ul style="list-style-type: none"> <li>Continue the development of the multi-year operating budget and 10-year capital budget.</li> </ul>
<b>Corporate Wide</b>
<b>Performance Management</b>
<b>Current Situation</b>
<p>Loyalist Township's 2020 Strategic Plan identifies 'Performance Measures' as one of the five essential elements used in the development of the Plan. The Strategic Plan includes a number of approaches to be used in "<i>tracking our progress towards achieving goals and objectives</i>": annual monitoring to measure success and progress against timelines; reporting of progress to Council and integrating the corporate Performance Management Plan and Operating Capital budgets. The 2020 budget also contains some performance measurements or results to be achieved for each strategic priority.</p>
<b>Issues</b>
<p>Staff views on performance measurement were varied and diverse. While measuring performance was generally considered to be useful, there was also a sense that it was very time consuming with the potential to provide limited return in terms of value added if the wrong measures, or too many measures, are included. There is a general absence of truly meaningful key performance and / or success measures, although the budget does provide some useful measures for some departments. The majority of Service Profiles, for example, provided very few performance measures actually used and, where they were identified, they tended to focus on the volume of work completed as opposed to efficiency or quality of customer service. The quality of customer service or level of public satisfaction was one performance measure where there was general agreement that improvement is needed.</p>
<b>Analysis</b>
<p>There is a vast amount of literature on public sector performance measurement and approaches. Regardless, any new performance measurement program that is implemented will require a long-term commitment of staff time which in turn places pressure on the limited resources available to smaller municipalities like Loyalist Township. Another approach would be to develop performance measures on an as-needed basis; for example, when there is a specific gap or issue identified by staff or Council members with respect to a particular service activity. Adding performance measures to the budget report would be helpful where they are currently lacking.</p>

For example, departments could include in the budget operational performance measures the degree of compliance with legislative requirements such as the processing time for Zoning or Official Plan amendment applications, or for processing Freedom of Information requests, or for snowstorm road clearance.

Given the provisions of the Strategic Plan, staff should be preparing an annual report to Council on the progress / success levels of the performance indicators contained in the 2020 Strategic Plan. The report should be prepared during the 2<sup>nd</sup> quarter of each year to avoid adding an additional workload during the budget preparation period, while still providing useful background to budget deliberations and an opportunity for Council to influence budget preparation.

#### Recommendations

- Prepare an annual report to Council on the progress in meeting Strategic Plan objectives.
- Continue to expand the number of departments and services providing performance indicators as part of the annual budget submission.

Corporate Wide									
<b>Additional Staff</b>									
Current Situation									
The table below compares the staffing level per 1,000 residents between Loyalist and similar sized municipalities.									
<p><b>Table 14 Staffing per 1,000 Residents for Loyalist and Comparator Municipalities</b></p>									
	Loyalist Township	Clarence-Rockland	Greater Napanee	Huntsville	North Grenville	Port Hope *	Russell	Selwyn	Mississippi Mills
Population	16,971	24,512	15,892	19,816	16,451	16,753	16,520	17,060	13,163
Staffing Level Per 1,000 Residents*									
Full-time	5.2	3.5	4.3	4.4	3.9	5.0	6.4	2.5	2.7
Part-time	1.4	1.1	3.0	3.8	1.7	3.4	2.1	0.4	0.8
Seasonal	0.6	0.2	1.3	4.0	1.6	1.8	1.5	0.8	1.6
Total*	6.2	4.2	6.4	8.3	5.5	7.6	8.2	3.1	3.9
<ul style="list-style-type: none"> <li>• Total is calculated as full-time staff plus one-half of part-time and seasonal staff</li> <li>• Excludes volunteer firefighters and “other” which includes the Ferry staffing in the case of Loyalist Township</li> <li>• Port Hope data from 2017</li> </ul>									
<p>Additional detail is provided in Appendix B, showing the staffing for some major functions within each of the municipalities.</p>									
<p>The table above shows that Loyalist has more full-time staff than all but one of the other municipalities (ferry staffing is excluded as most municipalities do not have a ferry). The only municipality higher is Russell and this results from it having a full-time fire service. On the other hand, Loyalist has relatively low part-time and seasonal staffing levels. The total, counting part-time staff and seasonal staff as one-half each, which is only approximate, shows Loyalist in the middle of the group.</p>									
<p>The budget for Loyalist includes an appendix with a list of extra positions that are requested to support various services. The list contains 10 full-time positions and 3 part-time positions (or the conversion of a part-time position to full-time) that are required to support service delivery in various areas.</p>									
Issues									
There is a good case for many of the positions sought if looked at in isolation. The									

biggest challenge is that the Township has limited sources of revenue, and taxpayers have a limited capacity to support growth in positions, even if they are warranted. The Township currently has about 130 permanent full-time employees. It also has 8 temporary full-time positions and 140 temporary, casual or student positions and 106 volunteer firefighters. It is experiencing growth of assessment, the prime source of its revenue, of about 3.5%. Utility accounts have a similar growth rate – and that is the second most important source of revenue.

A sustained growth in assessment also means the Township is also experiencing population and business growth which in turn place additional demands on municipal services ranging from engineering to recreation. Assessment growth is different than inflation (e.g. increase in the price of equipment purchases or salaries) which impacts the tax rate.

A 3.5% assessment growth would then suggest that the Township could add 3.5% or almost 5 full-time positions to its establishment without impacting tax or utility rates. The extra staff should be able to maintain the same level and quality in delivering services to the extra 3.5% of population. This report therefore looks to recommend 5 new full-time (or equivalent) positions to be added in 2020 and identifies others to be considered in 2021, along with 5 part-time, seasonal or student positions. Not all services will receive new staff each year using this approach; however, additions can be spread out over the years, in each case supplementing the most challenged units. This may limit the rate of progress in achieving some Township goals but will help ensure affordable rates.

### Analysis

This section analyses the positions identified in the budget and suggests the highest priority positions to be added in 2020. The consulting team did examine the organization chart of the Township with a view to identifying any additional requirements because of issues like the span of control of supervisors and did not identify any additional requirements not noted below.

#### Information Technology (IT) and Geographic Information System (GIS)

- An extra position for IT would allow more focus on developing a comprehensive IT strategy for the Township, while maintaining the day-to-day support function. There is also concern that the GIS resourcing is inadequate, particularly as the second planning tech position is primarily involved with Committee of Adjustment applications (about 2/3 of the time) with the remaining time on GIS related work. These are both areas of importance to the future growth and development of the Township. The IT section of the report suggests engaging a consultant to prepare the IT strategy which should include the GIS activity, the resourcing required and the appropriate location of the activity within the organization. Adding additional resources could wait until the strategy is complete, to ensure the right set of skills and capacities are sought in any new positions.

## Human Resources (HR)

- With a dedicated Human Resources staff there has been considerable progress in developing an effective HR program and services. HR staffing levels of 1:100 (1 HR staff to 100 employees) and higher is not unusual in small organizations. An additional position would help provide a higher level of customer service, allow improvements to the health and safety program, aid in training, reduce accidents, and promote a safer workplace. This position is required and should be filled next year, if an exploration of shared service options does not find a more economical way to expand capacity.

## Emergency Services

- The Fire department has a long-term goal of adding one firefighter per year until it has four full-time firefighters on the dayshift at the Ernestown firehall. This program recognizes the difficulty of recruiting volunteer (part-time) firefighters during the daytime when most suitable candidates in Amherstview are working in Kingston. It also responds to the emerging standard of having 10 firefighters respond to a fire within 10 minutes of a call in the urban areas. This standard is very challenging for most volunteer forces to achieve. We have not yet seen the results of COVID-19 in creating a “new normal”. Will it result in more employees working from home and being available as volunteer firefighters – or will most employees start heading back to Kingston? We can also see in Appendix B that there is a wide variety of full-time staffing levels among the comparator municipalities. Russell has a fully career fire department with 53 full-time staff. Greater Napanee had 11 full-time firefighters in 2008, while the five full-time staff in Loyalist were similar to the other municipalities. Loyalist has the largest number of volunteer firefighters, but it also operates 4 stations (one on Amherst Island) where other municipalities only operate two or three. It is therefore suggested that a firefighter be engaged in 2020, but that the 2021 hiring be placed on hold pending a reassessment of future needs based on average response times with the 2020 hire in place.

## Public Works

- Appendix B shows that Public Works staffing is already higher than it is in other municipalities, although that is partly because Loyalist maintains their own water and sewer systems while some municipalities contract it out. Water and Sewer is included with Public Works data in Appendix B because of the Province’s reporting requirements in the annual Financial Information Returns.
- Council has approved the addition of another truck / plow route in 2020. This did require the addition of two operators (one on each shift). This might be avoided by adopting the option to segregate routes between arterials / collectors and residentials, with residentials only plowed on one shift. However, this would reduce the level of service.

- The supervision positions have been recently adjusted. Initially there were 4 supervisors (Island, Mainland, Technical and Mainland/Fleet). Now there are 3 supervisors (Roads, Technical and Public Transit/Fleet) and three assistants reporting to the Roads supervisor. One assistant will be responsible for the Island, one for each shift in the winter, and they will switch to one for construction and the other for maintenance in the summer. The change results in a net increase of two positions. It adds to the policy and management capacity as the Roads supervisor will have less operational responsibility, and the Public Transit/Fleet position will provide some management of these expensive operations. It will also allow for a more effective management of day-to-day operations by the assistants.
- An administrative support position is sought to take administrative duties off the supervisors and Manager and allow them to focus more on their core activities. The administrative assistant would also review service requests to ensure they are completed on a timely basis. Given the addition of two supervisory positions this year, this position could wait until next year.
- There are currently 6 contract positions related to winter control and summer operations. The Township is exploring the cost and benefits of converting these contracts into 3 full time positions including the cost savings of recruitment and retraining of new contract employees versus the costs of benefits for full time employees and the need to pay salary for 12 full months. We do note that the Township is one of three municipalities with a significant seasonal staff component, while five others do not use many seasonal staff (see Appendix B).

#### Facilities

- Facilities initially sought an additional cleaner to handle the Manitou Building. The building is now in service; however, the COVID-19 situation has reduced building loading from COVID and raised questions about the level of cleaning service that is really required. The Township has also been moving towards contracted cleaning. The SWOT meetings also expressed concern that two individuals are not enough to maintain all facilities. Use of contracted professionals can assist but they still require supervision, access to facilities and direction concerning the nature of the work required. The staffing level will have to be re-examined once the building condition assessments are completed and use of facilities increases as COVID-19 restrictions ease.

#### Planning

- There is currently a full-time planning tech position split between planning work (2/3) GIS activities (1/3). The current Heritage Assistant position is part time. The department seeks to convert the heritage assistant part-time position into a junior planner position to help with the workload. The position would retain the heritage work and add further assistance to the planning group on other applications. Improvement in the planning process is required, but it will not be

clear if this is the best solution until the County process is complete. The appropriate approach to GIS functionality will be considered in the IT Strategy. Action could await the conclusion of these processes.

### Engineering

- The Engineering group has seen three of its positions repurposed and transferred:
  - the Assistant Township engineer was transferred to the Asset Management Manager position. The staff member also did asset management in the previous position.
  - One GIS technician was moved to Planning where GIS requirements from Engineering can still be completed.
  - A policy analyst became a corporate resource.
- A new position would allow for more focus on climate action and environmental stewardship in the capital program and in technical input to operations. This will become increasingly important as the Province downloads responsibility for some environmental approvals (sewer approvals expected this fall, excess soil approvals also expected). It would also allow reduced reliance on outsourced services. This position is already approved in the 2020 budget but should be provided as a pre-commitment in 2021, allowing hiring early in the new year.

### Utilities

- A second compliance position was approved in the 2020 budget and the person has since been hired.

An electrical apprentice position would expand the capacity of the maintenance group and may assist with transition planning. While desirable, this expansion could wait until next year.

### Corporate Communications

- As noted earlier, the part-time marketing position in recreation is to be transferred to Corporate Communications. Recreation will remain a key user of this service, and expanding the mandate of this position to the entire corporation, as well as making the position attractive enough to a skilled candidate may require conversion of this position to a full-time position.

Note that the organizational structure as a whole was reviewed to determine whether spans of control were reasonable and whether the new organizational structure works effectively and makes sense. There are some areas that different municipalities handle differently. For example, smaller municipalities tend to make storm drainage a responsibility of the Roads group as most drainage is in ditches along roads and through culverts under roads and road accesses. Larger and urban municipalities tend to make storm drainage a Water and Sewer group responsibility as most storm drainage is in pipes, like water and sewer systems. Loyalist has left storm water systems as a Roads responsibility to date, even as the urban area has expanded. As most of the pipes are relatively new and clearing the catch basins is the major activity

at this point, this assignment still makes sense, but as pipe related maintenance becomes more of an issue, the Township should consider transferring this responsibility to the Water and Sewer group. Note that Road costs tend to be allocated to the property tax bill, while Utility costs are generally charged to the Utility rates. However, the work should be assigned where it can be done at the lowest cost. The actual costs can be included in the appropriate rate regardless of who does the work.

The spans of control all seem reasonable, with the addition of Roads supervisors for the two winter shifts, with one focusing on construction in the summer season. Effective management of construction contracts and activities is an important way to ensure funds are well spent.

### Recommendations

Adopt the principle that staffing will increase annually in line with the rate of community growth allowing for:

- 5 new full-time positions in 2020 and 2021.
- up to 5 new part-time, casual and student positions per year (the effect of COVID on recreational staffing requirements should be considered – e.g. staffing increases may be deferred).
- Volunteer Firefighters are a unique category. They are used as required to respond to emergencies and recruitment can defer the need for full-time staff. There should not be a limit on recruitment (recognizing it is becoming more challenging!).

The following positions were added in 2020:

- One additional firefighter
- Two PW operators, unless snow clearing service levels reduced
- Two net new positions among PW Supervision
- One Utilities Compliance Position

Limit new full-time positions to four in 2021 given that 6 were added in 2020.

One part-time position be used to convert the Marketing position in Communications to full-time.

Prior approval be given for the following position to be hired as part of the 2021 quota:

- One Project Engineer position

Staffing requirements related to the following functions be considered in the future, as related studies are completed:

- IT and GIS functions
- Further FT firefighter positions

- Human Resource staffing
- Facilities staffing
- Heritage Assistant position
- Administrative support in PW
- The conversion of 6 contract positions into 3 full time positions for winter control and summer operations.

## Impact Evaluation of Improvement Theme Recommendations

The table below provides an evaluation of the recommendations in the themes against the evaluation criteria. In each case a “3” score is neutral, a lower score is negative (e.g. additional costs, high risks, etc.) and a high score is positive (a cost reduction, improved service level, etc.).

Improvement Theme	Evaluation Criteria					
	Operating Cost	Capital Cost	Service Levels	Barriers	Risks	Strategic Plan
Customer Services	3	2	4	3	3	4
IT Strategy	2	2	5	2	2	5
Records Management	2	3	4	2	3	3
Corporate Communications	2	2	5	3	3	5
Shared Services	5	3	4	2	2	4
Procurement	3	3	3	3	3	4
By-Law Enforcement	3	3	3	3	3	4
Planning Process	3/2	3	5	2	3	5
Economic Growth	3	3	4	3	3	4
Recreation Centre / Hub	2	1	5	2	2	5
Solid Waste	2	3	4	2	2	4
Fleet	3	3	4	3	3	4
Museums / Heritage	2	2	4	3	3	4
Island Ferry	3	2	4	2	3	4
Transit	3	3	4	3	2	4
Winter Roads	2	2	4	3	3	4
Budget Process	3	3	4	3	3	5
Performance Management	2	3	4	3	3	5
Staffing	1	3	4	3	3	3

## Appendix A Other Opportunities Raised

This appendix lists opportunities that were identified in the process (through the Workshops, Benchmarking, review of Service Profiles). This list does not include the opportunities that were explored in detail above. Some of these opportunities may be worth pursuing at some time, but they have not been fully vetted, and some of them are likely not worth implementing.

<b>Opportunities</b>	<b>Dept</b>	<b>Organization</b>	<b>Service</b>	<b>Sub-Service</b>
Develop meaningful performance indicators / success measures	Corp	All	All	All
Improve supervision of operations staff	Corp	All	All	Public Works / Facilities / Utilities / Ferry / Recreation
Train staff to deal with negative public perceptions through better use of educational resources	Corp	All	All	Recreation / Facilities / Public Works / Utilities / Ferry
Move budget processing to December, except in election year	BS	Finance	Finance	Financial Planning Services
Develop risk management policy	BS	Finance	Finance	Other Services
Consider electronic mail-outs of tax bills	BS	Finance	Finance	Property Taxes
Use electronic signatures on cheques	BS		Financial Services	
Improve health and safety training especially on-site construction	BS	Human Resources	Human Resources	Health and Wellness
Identify and update key policies / develop service standards (In progress)	BS	Human Resources	Human Resources	Regulatory Framework & Support
Improve leadership development training	BS	Human Resources	Human Resources	Staff Development & Retention
Improve training: performance management, managing people / corporate wide	BS	Human Resources	Human Resources	Staff Development & Retention

<b>Opportunities</b>	<b>Dept</b>	<b>Organization</b>	<b>Service</b>	<b>Sub-Service</b>
Develop formal succession planning	BS	Human Resources	Human Resources	Staff Development & Retention
Develop / implement improved onboard training / templates and business continuity policies	BS	Human Resources	Human Resources	Staff Development & Retention
Strengthen 'Loyalist Cares' initiative re: internal personal support / ambassadors	BS	Human Resources	Human Resources	Staff Development & Retention
Enhance orientation / onboarding process for new and transferred staff	BS	Human Resources	Human Resources	Staff Development & Retention
Improve knowledge transfers from long term employees	BS	Human Resources	Human Resources	Staff Development & Retention
Improve education and cross training: processes, procedures, forms	BS	Human Resources	Human Resources	Staff Development and Retention
Clean offices less frequently (Recent experience suggests it would be adequate)	CSS		Facilities	
Review scheduling of arena with respect to ice making in summer relative to revenues and rentals	CSS	Public Works Recreation	Public Works Recreation Services	Facilities Facility Bookings
Develop roster of contractors when emergencies occur	CSS	Public Works	Public Works	Facilities
Improve public understanding of when and why things get done	CSS	Public Works	Public Works	Facilities
Develop Township wide standardization of facility parts / replacements / fixtures. Centralize / digitize data	CSS	Public Works	Public Works	Facilities
Combine summer and winter seasonal positions to make full-time positions	CSS	Public Works	Public Works	Winter Control, Roads, Parks
Develop new operating agreement with MTO	CSS	Public Works	Public Works	Ferry Service

<b>Opportunities</b>	<b>Dept</b>	<b>Organization</b>	<b>Service</b>	<b>Sub-Service</b>
related to new electric ferry service				
New electric ferry could attract people, other experts, to see operations	CSS	Public Works	Public Works	Ferry Service
Develop succession plan for senior Ferry positions	CSS	Public Works	Public Works	Ferry Service
Develop training program for promotion / licensing achievements	CSS	Public Works	Public Works	Ferry Service
May require additional crew with new service / maintain additional dock facilities	CSS	Public Works	Public Works	Ferry Service
Participate in Eastern Ontario Mayors and Wardens Caucus review of commuter trends / issues	CSS	Public Works	Public Works	Transit
Promote new ideas re: Change Management	CS	Corporate Management	Corporate Management	Information Management
Establish corporate wide education re: Corporate wide service requests	CS	Corporate Management	Corporate Management	Information Management
Develop strategic planning at service levels	CS	Corporate Management	Corporate Management	Information Management
Develop protocols for interaction between staff and Council members	CS	Corporate Management	Corporate Management	Information Management
Review Election process and determine reason to maintain Wards and paper ballots	CS	Corporate Management	Corporate Management	Municipal Election Management
Look at technology - identify needs / requirements of equipment	CSS	Public Works	Fleet Management	Fleet
Encourage larger parks in new subdivisions	CSS	Public Works	Public Works	Parks and Sports fields
Better standards / oversight re: tree planting in subdivisions	CSS	Public Works	Public Works	Parks and Sports fields
Improve proactive / preventative parks maintenance	CSS	Public Works	Public Works	Parks and Sports fields

<b>Opportunities</b>	<b>Dept</b>	<b>Organization</b>	<b>Service</b>	<b>Sub-Service</b>
Improve control of noxious weeds / invasive species with integrated pest management plan	CSS	Public Works	Public Works	Parks and Sports fields
Fix drainage at Will Pratt field	CSS	Public Works	Public Works	Parks and Sports fields
Contract for prime sports field maintenance (after repairs)	CSS	Public Works	Public Works	Parks and Sports fields
Place tree inventory in Asset Management	CSS	Public Works	Public Works	Parks and Sports fields
Parks maintenance input into Plans of Subdivision	CSS	Public Works	Public Works	Parks and Sports fields
Improve roads in summer to perform better in winter e.g. ditching, gravel to surface conversion	CSS	Public Works	Public Works	Roads
Examine need for proper snow dump	CSS	Public Works	Public Works	Roads
Develop inventory of trees in right of ways across Township including dead trees on Island	CSS	Public Works	Public Works	Roads
Modernize sand / salt application techniques	CSS	Public Works	Public Works	Roads
Develop rural road improvement strategy	CSS	Public Works	Public Works	Roads
Evaluate Anti-Icing Liquids (DLA) program options	CSS	Public Works	Public Works	Roads
Need long term plan for improving ditches to upgrade rural roads	CSS	Public Works	Public Works	Roads
Do trial with loader for cul-de-sacs before purchasing	CSS	Public Works	Public Works	Roads
Improve efficiencies and productivity through hiring leased equipment and larger dump trucks	CSS	Public Works	Public Works	Roads
Storm ponds maintenance needs better planning	CSS	Public Works	Public Works	Technical Standards
Develop stronger linkages between heritage properties / museums with economic development	CSS	Recreation	Recreation	Cultural Services

<b>Opportunities</b>	<b>Dept</b>	<b>Organization</b>	<b>Service</b>	<b>Sub-Service</b>
Improve or abandon efforts on sponsorship / advertising	CSS	Recreation	Recreation	Recreation Services
Expand use of new media in marketing recreation services	CSS	Recreation	Recreation	Recreation Services
Strengthen relationships / focus for community engagement like schools, Lions Club	CSS	Recreation	Recreation	Recreation Services
Increase fees	CSS	Recreation	Recreation	Recreation Services
Enhance marketing and public awareness of services	CSS	Recreation	Recreation	Recreation Services
Maintain inventory of commercial and industrial lands	ECGDS	Development Services	Development Services	Economic Development
Centralize / coordinate planning / engineering / building data for customers	ECGDS	Development Services / Engineering	Development Services / Engineering	All
Develop workflows for various standard work functions (e.g. capital project delivery, inspections)	ECGDS	Engineering	Engineering	Municipal Infrastructure
BWTP upgrades scheduled for 2020 to improve redundancy and assist with turbidity issues	ECGDS	Utilities	Municipal Drinking Water and Sewage Disposal	Drinking Water
Prepare Biosolids Management Strategy	ECGDS	Utilities	Municipal Drinking Water and Sewage Disposal	Sewage Treatment
Strengthen communications and education with public	ECGDS	Utilities	Municipal Drinking Water and Sewage Disposal	Water / Sewage
Establish in-house design capabilities for roads	EGCDS	Engineering	Engineering	Municipal Infrastructure
Better coordination at beginning of capital	EGCDS	Engineering	Engineering	Technical Standards

<b>Opportunities</b>	<b>Dept</b>	<b>Organization</b>	<b>Service</b>	<b>Sub-Service</b>
projects re: standardization.				
Strengthen preplanning for most emergencies	ES	Emergency Services	Emergency Services	Emergency Planning
Set emergency response time targets that distinguish urban and rural areas	ES	Emergency Services	Emergency Services	Emergency Response
Share resources where feasible with County and surrounding communities / Kingston	ES	Emergency Services	Emergency Services	Fire Services
Cooperate with neighbouring municipalities for fire training	ES	Emergency Services	Emergency Services	Fire Training
Upgrade tankers and dry hydrants	ES	Emergency Services	Emergency Services	Fleet

## Appendix B Staffing at Comparator Municipalities

As reported in 2018 FIRs

	Loyalist Township	Clarence-Rockland	Greater Napanee	Huntsville	North Grenville	Port Hope *2017 data	Russell	Selwyn	Mississippi Mills
Population	16,971	24,512	15,892	19,816	16,451	16,753	16,520	17,060	13,163
Administration									
Full-time	17	35	18	32	11	23	13.5	13	10
Part-time	2	10	17	10	0	3	2	1	2
Seasonal	0	2	0	0	0	0	0	0	1
Fire									
Full-time	5	6	11	6	4	5*	53	3	1
Part-time**	86	72	66	58	40	58	54	67	71
Seasonal	0	0	0	0	0	0	0	0	0
Public Works (Including Water & Sewer and Solid Waste)									
Full-time	43	34	20	25	25	38	26	18	15
Part-time	4	3	11	0	3	5	0	1	4
Seasonal	9	1	1	13	8	0	0	0	7
Parks and Recreation									
Full-time	17	8	12	17	14	17	9	7	7
Part-time	17	15	20	62	25	49	33	4	5
Seasonal	1	0	20	66	18	30	24	14	13
Planning									
Full-time	6	4	7	7	10	2	4	2	2
Part-time	1	0	0	3	0	0	0	0	0
Seasonal	0	1	0	0	0	0	0	0	0
Other									
Full-time	39	5	16	8	1	3	10	3	4
Part-time	26	0	2	0	1	2	0	0	4
Seasonal	0	0	8	7	0	5	8	0	5
Total (Excluding Part-time Firefighters and "Other")									
Full-time	88	85	57	82	61	84	105.5	43	34
Part-time	24	28	48	75	28	57	35	6	11
Seasonal	10	4	21	79	26	30	24	14	21

• Port Hope firefighter staffing as of 2018

\*\* Volunteer firefighters data from Ontario Association of Fire Chiefs as FIR data is inconsistent

## Appendix C Potential Savings from Implementation

In conducting this Service Delivery Review Loyalist Township put a strong emphasis on maintaining or improving the level of service to the community. It is also a growing community with an expanding urban area, which has created pressures for expanded and improved services. In this context many of the recommendations relate to improving service levels and/or avoiding future growth in costs. The key elements are:

Establishing a cap on the number of full-time positions created each year reduces expenditures by:

	2020 Saving	Possible 2021 Savings*
• IT Coordinator	\$25,000	84,000
• Firefighter	57,000	100,000
• Public Works Clerk	42,000	42,000
• Heritage Assistant (PT to FT)	39,000	50,000
• Project Engineer	33,000	
• Maintenance Apprentice (Utilities)	87,000	88,000
• GIS		65,000
• Aquatics Supervisor		60,000
• Facilities		50,000
• Firefighter		100,000
• Less cost of four positions filled in 2010		<u>(250,000)</u>
Total	<u>283,000</u>	389,000

### Calculation Assumptions

- 2020 savings from Loyalist Budget document
- 2021 savings for first 6 positions from Loyalist Budget document, adjusted where recommendations provide for 2021 implementation
- Other 2021 savings relate to positions discussed in the Service Delivery Review or identified by staff in the process, with estimated savings assuming part year implementation
- Cost of 4 positions in 2021 assumes Project Engineer is one, and allows for any combination of the other positions.

Savings in future years are expected to continue and likely grow as long as the policy is retained, keeping the growth in positions to the rate of growth of the community.

There is further opportunity for savings related to the recommendations related to shared services (page 26), increasing Planning fees (page 33-34), seeking Recreation operating contributions from the City of Kingston (p 38), and developing a new fare collection approach for the ferry (p. 47). The amount of these savings will not be known until the opportunities are explored further.

The Public Transit recommendation to avoid extending transit service to the rural areas could avoid further substantial new expenditures, although the amount would depend upon the approach contemplated to extend service.

## Attachments – Service Profiles

See Service Profiles circulated separately.