



Town of Halton Hills

RFP #P-077-22: Service Delivery Review and Customer Service Strategy

Service Delivery Review Report

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Executive Summary

Document Introduction & Purpose

Aligned to recommendations outlined within the Customer Service Strategy, this report is structured to define the **current service delivery landscape for the Towns operating model, technology requirements and performance measurements** in support of more efficient and modernized service delivery. The objective is to equip the Council and Senior Administration with a clear understanding of how services are delivered today and the improvement opportunities to increase the effectiveness and efficiency of service interactions both externally with customers and internally with colleagues.

At the onset of the project, the following Service Delivery Review objectives were set:

1. Analyzing and summarizing the volume, types and turnaround times for transactions that occur across the town
2. Evaluating what method of delivery is utilized (i.e., in person, online, virtual, mail).
3. Reviewing internal processes that support public facing transactions (e.g., movement of cash receipts)
4. Understanding resource allocation and staffing to support existing processes
5. Assessing quality of service and customer satisfaction
6. Providing information on municipalities and/or private or public practices to inform and benchmark progress
7. Findings and recommendations, with quantifiable metrics, should be consolidated in the form of a report. The report will summarize the consultant's findings and identify specific, actionable recommendations based on the analysis and findings that aim to identify cost savings and improved efficiencies. The report will include detailed explanations and calculations of identified potential quantifiable efficiencies and/or cost savings.

It is important to note that elements of the Customer Service Strategy are further explored within the Customer Service Strategy Report. Some elements of the Strategy have been included within this report to provide context but are not the focus of this report.

The primary focus of the report is to identify "GAPS" in service delivery and from this understanding define cost and efficiency improvement opportunities. These defined opportunities are then aligned with Customer Service Strategy Recommendations to drive a better service experience for all those who interact with the Town of Halton Hills. Due to this focus, the report outlines more of the "Weaknesses" and "Threats" as opposed to the positive elements of what the Town does within the service landscape. That is not to say that these do not exist. The Town of Halton Hills is delivering many aspects of service very effectively and done extremely well. These areas do not provide any opportunity for further improvement and therefore were not included within the report.

Acknowledgement

We would like to take the opportunity to acknowledge the assistance and cooperation provided by staff of the Town of Halton Hills and community stakeholders that participated in the development of the

Service Delivery Review and Customer Service Strategy. We appreciate that reviews such as this require a substantial contribution of time and effort on the part of Town employees, and we would be remiss if we did not express our appreciation for the cooperation afforded to us.

Project Overview

The Town of Halton Hills is looking to continuously improve on how the organization delivers services and engages with customers. To identify targeted areas of improvement, the Town has engaged third-party consultancy CSPN to perform a review. The key outputs of the engagement include a comprehensive 1) Service Delivery Review and 2) Customer Service Strategy Report inclusive of all key findings, analysis, improvement opportunities, recommendations, and implementation planning.

The project outlined two key goals:

1. Identify opportunities for increased effectiveness and efficiency in service delivery by conducting a thorough and comprehensive review of services offered by the Town.
2. Evaluate and develop a customer service strategy with a corresponding action plan for implementation, including targets, key performance indicators, timelines and milestones, governance model and roles and responsibilities.

To achieve these goals a comprehensive research process was undertaken, which included several internal and external consultations, document reviews, and surveys. An overview of the research is outlined below.

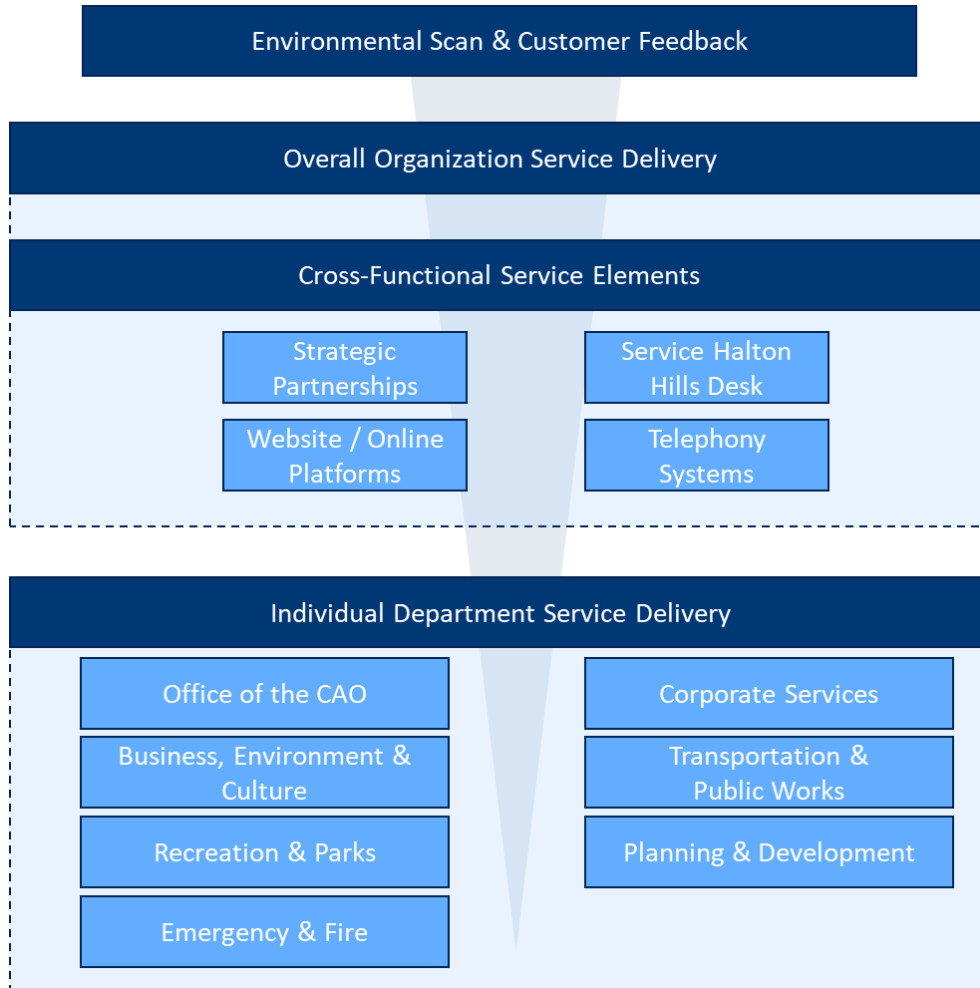
- Existing Document Research
 - ~105 documents / data files reviewed (16-Jun – 18-Jul)
- Stakeholder Interviews
 - 21 individual employee interviews - including Mayor (28-Jun – 8-Aug)
- Stakeholder Group Workshops
 - 22 group employee workshops - including Council (28-Jun – 8-Aug)
- Customer Focus-Groups
 - 5 customer focus-groups (1-Aug – 15-Aug)
- Customer Feedback Survey
 - 466 customer responses collected (18-Jul – 22-Aug)

See Appendix I for the Project One Page Summary for more details about the project.

Report Structure

Aligned to the Project Objectives listed above, the report is structured into four main sections which include 1) Environmental Scan & Customer Feedback, 2) Overall Organization Service Delivery, 3) Cross-Functional Service Elements, and 4) Individual Department Service Delivery. Within each section, sub-sections are identified to address the specific project needs at the appropriate level of detail. Each of the sections and sub-sections are explored in detail throughout the report to ensure a comprehensive review was completed.

Visual Outline of Report Structure



This report provides a summary of recommendations aligned to each theme and sub-theme. The report includes the following information:

- An overview of key findings and observations from the current-state service landscape to provide context to the identified recommendations.
- The proposed recommendations, including more detailed information for what challenge is expected to be addressed.
- A detailed list of the anticipated cost and efficiency savings of each of the identified recommendations uncovered throughout the review.

Cost & Efficiency Recommendations Summary

Aligned to the report structure outlined above, the following list is a summary of the identified Service Delivery Review Cost & Efficiency Savings recommendations.

	Number of Recommendations	Estimated Annual Efficiency Savings (hrs.)		Estimated Annual Cost Savings (\$)	
		Low Range	High Range	Low Range	High Range
Total	66	5,750	12,550	\$350,000	\$815,000
Overall Organization	16	1,750	3,750	\$125,000	\$255,000
Office of the CAO	12	250	900	\$10,000	\$75,000
Business, Environment & Culture	3	250	650	\$20,000	\$45,000
Corporate Services	6	1,100	2,250	\$65,000	\$135,000
Transportation & Public Works	14	1,750	3,250	\$105,000	\$230,000
Recreation & Parks	7	100	250	\$10,000	\$25,000
Planning & Development Services	6	450	1,200	\$15,000	\$40,000
Emergency & Fire Services	2	0	100	\$0	\$10,000

1.0 Environmental Scan

The following section provides a review of comparator municipalities to the Town of Halton Hills. The comparator scan looks to examine commonalities and best practices of customer service across eight peer municipalities. Comparator municipalities have been identified based on population size, urban / rural characteristics, geographic proximity, and size. Comparators were chosen to reflect Halton Hills' current population size, as well as anticipated population growth.

The following municipalities were selected as comparators:

- Municipality of North Grenville
- Municipality of Clarington
- Town of Caledon
- Town of Oakville
- Town of Milton
- City of Sudbury
- City of Cambridge
- City of Kitchener

Comparators have been assessed across four categories (1) Customer Service Strategy, (2) Service Types and Channels, (3) Service Process Digitization, and (4) Service Training.

Customer Service Strategy

Many peer municipalities have developed a Customer Service Strategy that guides their overall customer service efforts. These strategies are well documented, actionable, and socialized across the organization to outline the vision of what great customer service delivery looks like. Common elements of what a Customer Service Strategy includes a vision statement, guiding principles, and goals that define how best to serve customers.

Definitions of Common Customer Service Strategy Elements

Vision Statements: A vision statement is an aspirational statement that expresses an organization's desired future state. For example, Sudbury's customer service vision is:

"We foster and build a service-focused culture with empowered employees who know what to do, how to do it, and who go the extra mile to provide a positive customer experience. When citizens engage with the City, they receive consistent, timely, and solution-oriented service."

Guiding Principles: Guiding principles are a set of moral values that establish a framework for expected behaviour and decision-making. Some examples included in Sudbury's Customer Service Strategy are as follows:

- We have agreed upon standards for customer service
- We recruit, train and empower employees to provide great customer service and recognize those who go the extra mile
- We resolve issues on a first contact basis where possible

Customer Service Goals: Customer service goals are tangible actions that are created to drive the overall objective of providing a customer-centric service. Some examples of common service goals include the following.

- Developing trained and knowledgeable staff
- Meeting customer needs with empathy and kindness
- Providing accurate, honest, and consistent information
- Building and enhancing the organizations capacity to provide great customer service
- Routinely measuring performance against defined standards (E.g., first call resolution)
- Investing in customer-centric digital transformations

Performance Measures

Metrics and key performance indicators (KPI’s) are tracked to support organizations with making improvement decisions, managing customer service delivery, and informing the effectiveness of Customer Service to improve the overall customer service experience. Common municipal service performance measurements are aligned to two main categories: 1) Customer Experience Metrics and 2) Operational Service Standards.

Customer Experience Metrics

Customer Experience Metrics help organizations understand insights about customer needs, expectations, preferences, and satisfaction. Customer satisfaction scores are indicators used to measure customer service delivery by evaluating customer sentiment on their current experiences. Customer satisfaction or citizen satisfaction surveys are commonly used by municipalities to measure these metrics. Typically, surveys are conducted over the phone or online on a yearly basis. Common customer experience metrics tracked include.

- Net-Promoter Score (NPS): Measures the level of loyalty customers feel towards the organization by uncovering how likely they are to recommend to someone else
- Customer Satisfaction Score (CSAT): Measures the general positivity / satisfaction customers have with the organization as a whole or any individual aspect
- Customer Effort Score (CES): Measures the level of effort / simplicity customers experience when interacting with the organization or services
- Customer Interaction Preferences (CIP): Measures the general preferences customers have when interacting with the organization and /or services (i.e., what channels they use, when they interact, what they want to complete, what the value).

Customer Experience Metrics Tracked by Municipalities:

Organization	Net-Promoter Score	Satisfaction Score	Effort Score	Customer Interaction Preferences
Municipality of North Grenville		✓		✓
Municipality of Clarington		✓	✓	✓
Town of Caledon		✓	✓	✓
Town of Oakville	✓	✓		✓
Town of Milton		✓		✓
City of Sudbury		✓	✓	
City of Cambridge	✓	✓		✓
City of Kitchener		✓	✓	✓

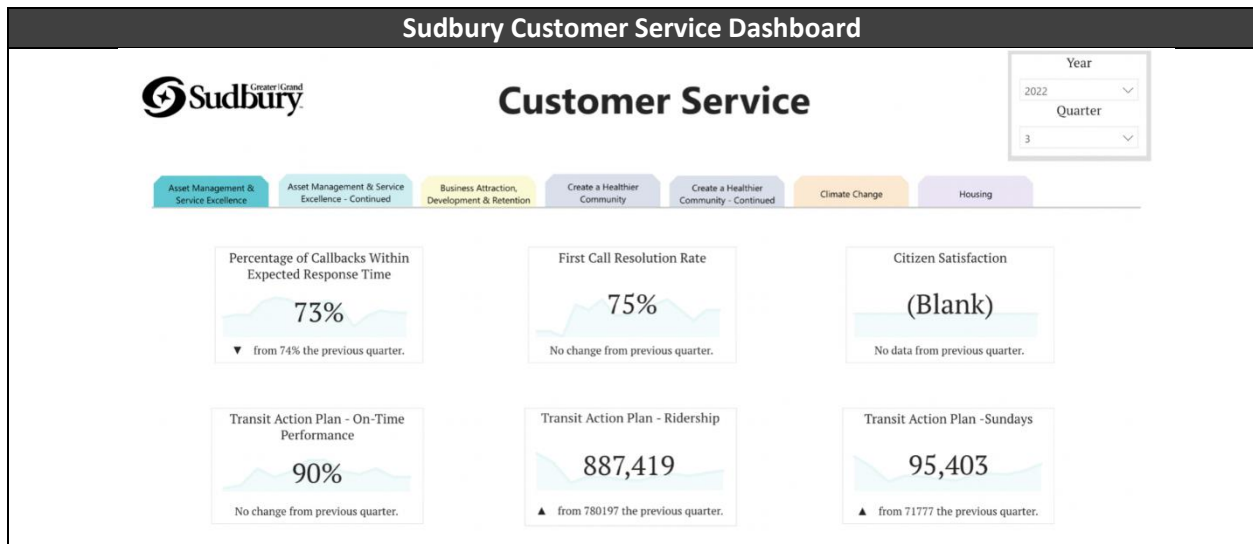
Operational Service Metrics

Operational service metrics help organizations understand insights about the volumes, timelines, and completion of services delivered from an internal perspective. These metrics are best collected through internal IT systems that automate and report out the information. Common operational service metrics tracked include:

- **First-Touch Resolution:** The number of tickets / cases / inquiries that are handled and “resolved / closed” by the first agent during their first interaction.
- **Average Resolution Time:** The total time that is taken by the support team to solve the issue once it is looked upon.
- **Interactions per Resolution:** The number of interactions the support agent and the customer have about a single issue before coming to a resolution.
- **First-Response Time:** The time it takes from when a customer makes a request to the time an agent "picks up / opens" the ticket / case / inquiry.
- **Abandon Rate:** The number of calls “abandoned / hung-up” while a customer was waiting on hold to connect with a human agent.

Example of Customer Service Tracking Method:

The below image us an example of a performance measures dashboard from a comparable municipality. This information is accessible online 24/7 by the public and is constantly refreshed with up-to-date tracking of the defined metrics / KPIs for the organization.



Service Standards and Policies

Service guidelines and policies outline key details for employees to adhere to when delivering services as well as what customers can expect when interacting with services. These tools are used to ensure there is consistent treatment of customers that is in-line with the Service Vision, Guiding Principles and Goals of the municipality.

Generally, service standards are defined at an overall organization level (i.e., accessibility service standards) as well as for specific interaction channels that services are delivered (i.e., telephone, written correspondence, in-person interactions and social media). The best-practice is to ensure these processes

are formalized, documented, and trained across the organization; however similar municipalities find it a challenge to do this effectively. As a commitment to customers, many municipalities publish their standards on the official municipal website.

Example of Customer Service Standard Procedure:

Oakville Customer Service Standard Policy
Telephone/voice mail <ul style="list-style-type: none">• Answer calls within three rings• Update voice mail with an informative message daily• Respond to high priority (related to non-emergency public safety) voice mail within one business day• Respond to voice mail by end of next business day
Written correspondence (emails, letters, memos, faxes, etc.) <ul style="list-style-type: none">• Respond to email by end of next business day• Respond to high priority emails within one business day• Ensure automatic or same business day acknowledgments for high volume areas or when unable to respond fully within the required amount of time. Provide a response time estimate based on the complexity of the inquiry and availability of staff. Total time should not exceed 15 business days• Respond to faxes, letters and memos within 15 business days of receipt
In person <ul style="list-style-type: none">• Attend to walk-in customers immediately. Serve customers in the order in which they appear, except when a customer has a scheduled appointment
After-hours inquiries <ul style="list-style-type: none">• All after-hours high priority or public safety issues should be directed to the town's after-hours emergencies call handling service.• To maintain work/life balance, respond to general inquiries received during non-business hours (evenings, Saturdays, Sundays, and statutory holidays) within two business days of the next business day.

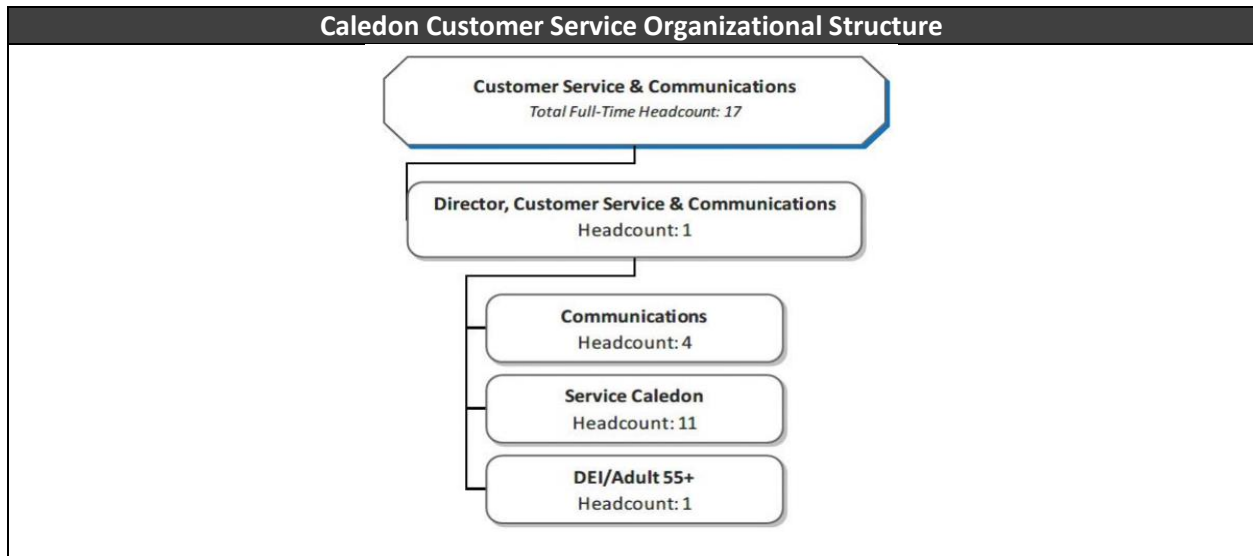
Service Types & Channels

Customer Service Structure & Operating Model

The organizational structure for service delivery across municipalities varies, however, the CAO commonly consists of direct reports that include Community Services, Corporate Services, Economic Development, Planning and Development.

Operating Model: The Customer Service team can report under different divisions, depending on the municipality's organization structure. With Caledon, Customer Service and Communications directly reports into the Office of the CAO. In Sudbury, the office of the CAO also includes Communications and Community Engagement – this division includes the 311 and Customer Service Section.

Example of Customer Service Organizational Structure:



Centralized Customer Service Model: Many municipalities are moving towards a centralized customer service model which is a service delivery method based on a single point of entry for all service requests. This is used to streamline processes for enhanced efficiency of service by decreasing transfers and duplicate work. A centralized customer service team is cross-trained and manages customer interactions and responds to service-related requests. In the case that further information is needed, the Service Team collaborates with department SMEs to process transactions. This relationship is defined in the Services Agreement for each department.

Customer Service Channels: A variety of channels are made available to customers that allow them to reach customer service through their preferred method. The available channels typically include phone, email, social media (Facebook and Twitter), in-person, customer feedback forms and online service requests. The City of Sudbury is the only municipality observed that provides live chat features to customers.

Summary of Service Channels Used by Municipalities

Organization	Phone	Email	Online	Social Media	In-Person
Municipality of North Grenville	One central contact number	✓	Feedback form	Twitter, Facebook and Instagram	✓
Municipality of Clarington	Multiple contact numbers	✓	Feedback form	Twitter, Facebook, LinkedIn, YouTube	✓
Town of Caledon	One central contact number	✓	Online forum / website	Twitter, Facebook, Instagram, LinkedIn, YouTube	✓

Town of Oakville	One central contact number	✓	Feedback form	Twitter, Facebook, Instagram, LinkedIn, YouTube	✓
Town of Milton	Multiple contact numbers	✓	Feedback / Contact form	Twitter, Facebook, Instagram, LinkedIn, YouTube	✓
City of Sudbury	One central contact number	✓	Live chat, online service request	Twitter, Facebook	✓

Service Process Digitization

Service-related technology and tools play an integral role in providing customer service solutions. This can either be employee facing or customer facing technology. Below outlines some of the common technology and tools used by employees and customers in comparable municipalities:

Digital Tools used by Employees	Digital Tools used by Customers
<ul style="list-style-type: none"> • AMANDA 25: Workforce management software • CityWide: Asset management system • Mitel Phone System: Voice over Internet Protocol • Great Plains: Accounting and Financial Management Software • SharePoint: Web-based collaborative platform integrated with Microsoft Office • Active Citizen Requests: Customer relationship management software to track calls • Web FOCUS: Business intelligence and analytics • Vailtech: Tax System 	<ul style="list-style-type: none"> • Email • Phone • City website • Online forms to report problems and submit feedback • Online application submissions (development application, volunteer opportunities) • Online permit submissions (building permits, parking permits) • Online license submissions (business licences, marriage licence, road license) • Customer service surveys • Online claims forms • Booking tools (facilities, recreational activities, building inspections) • Payment systems (parking ticket payments, property tax and utilities) • Live web chat with 311 • Online service request form

Self-serve Functionality: There is a focus on providing customers with self-serve functionality. Some examples include online payment systems, tax calculators, online bookings, application submissions, permits and licences.

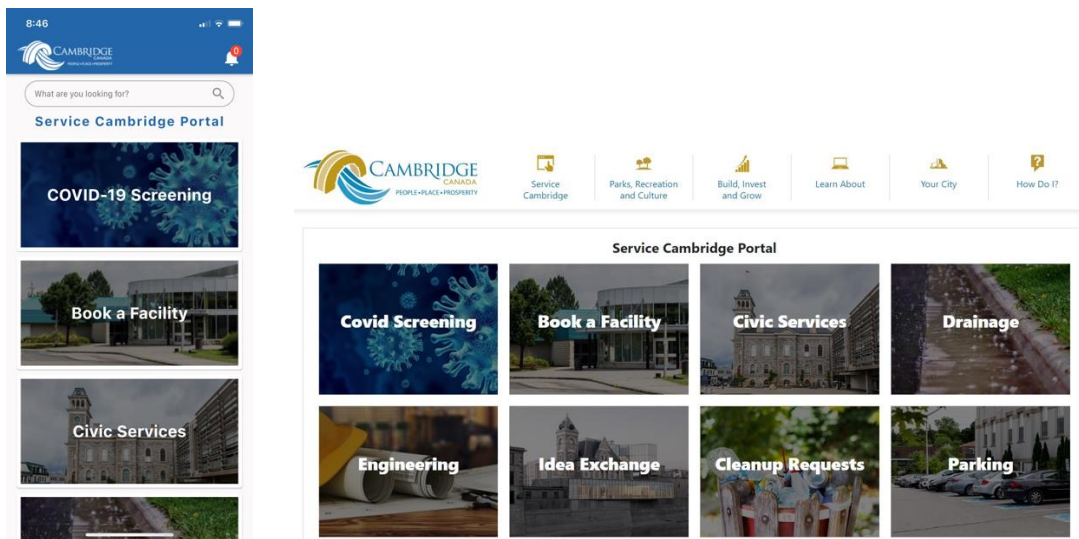
Online & Digital Customer Service

Online portals can enhance the customer experience through providing a one-stop digital access to multiple Town services and information. This streamlined user experience has become increasingly popular within the municipal context. The sophistication of customer service portals can vary depending on resources, in-person and digital services provided, or systems integration. At the most basic and first step, municipalities can refine the information architecture to direct users to services in a more efficient manner.

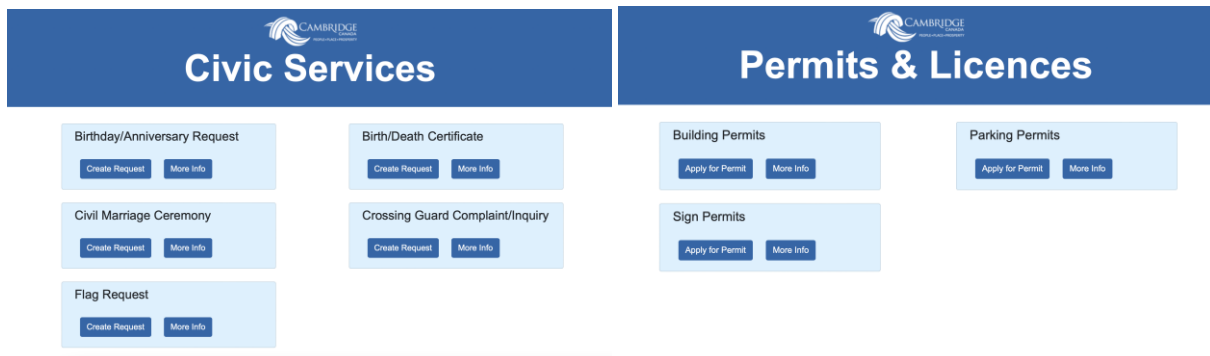
Example of municipalities that leverage customer portals includes:

Service Cambridge Portal

The Service Cambridge Portal is an example of a streamlined user experience for all customer service information and needs. Customers can visit the web portal (www.servicecambridge.ca) or the mobile Service Cambridge app to access non-emergency services and information. The images below show the interface of the mobile application (left) and the web portal (right).



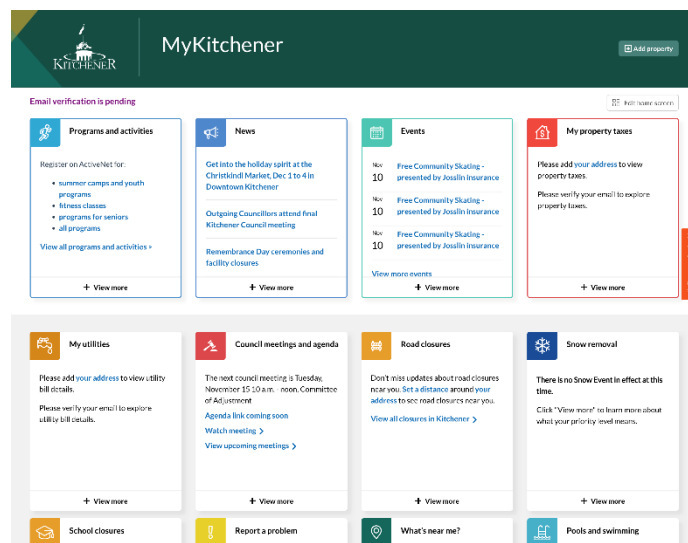
Within the portal, customers can choose a service or action of interest. This redirects customers to another webpage where they are provided more information, able to create a request, or complete a process online (see images below).



MyKitchener

MyKitchener is a more sophisticated customer service portal which provides all municipal information, updates, and online services into one convenient place. Once a user signs on they can create an account and customizable dashboard to view content that is relevant to them. Users can:

- Customize their dashboard with content that is relevant to them
- View information about multiple properties in one place
- Receive notifications when new information is available like new skating and swimming events, road closures and school bus delays
- View and pay property tax and utility bills
- View news and upcoming events
- Watch a council meeting and download meeting minutes and agendas, and so much more



Service Training & Skill Development

To empower employees to continuously deliver great service, staff need to be knowledgeable and have appropriate skills to address customer issues and direct customers to the right people. A clear training roadmap should be established that includes onboarding and ongoing skills development that is formalized and consistent across the service team. Training can include call shadowing, formal in-person or virtual leaning, e-learning and peer-to-peer learning. To make training material relevant and make improvements, feedback should be collected from staff who have completed training modules and incorporate into updates made.

For comparable municipalities, a lack of standardized training is a common challenge. Leaders have difficulty with maintaining their Customer Service teams skill levels through turnover and their knowledgebase through updates to services, policies, etc. Typical focus areas for training includes both technical skills, soft skills.

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- Technical Skills: Training focused on employee's abilities to perform technical tasks such as operating software, understanding customer management procedures and having the knowledge of organizational operations. This is typically conducted during onboarding and with any new technology or process changes.
- Soft Skills: Training focused on employee's abilities related to communication, showing empathy, problem solving, dealing with difficult situations, and other interpersonal skills that impact how they interact with external customers and internal team members.

HR-Downloads software is the most used training tools for comparable municipalities. Although it is used by most municipalities, the consensus is that it is not effective at upskilling and maintaining knowledge / skill levels for customer service teams. Overall, the tool does not adequately provide the specific technical skills training most requested by customer service team members.

2.0 Customer Feedback & Satisfaction

Customer feedback & satisfaction insights reflect the high-level findings within the mass Customer Feedback Survey which was open to the public from July 25 to August 23, 2022.

- A total of 466 participants completed the survey.
- Respondents to the survey were required to provide postal code information when registering.
- This information indicates that nearly 99.5% of respondents were from Halton Hills. Only two responses came from Wellington.

For more detailed information of customer feedback collected within the customer survey please refer to Appendix III.

Customers cite an overall, 61.4% satisfaction with customer service provided by the Town

Key Customer Service Challenges

- Difficulty knowing responsibility of each role within the organization causing confusion of who to contact and lack of accountability
- The greatest challenge when interacting with the Town is unclear and/or unavailable information
- Just over a third of survey respondents believe the navigation of the Town's website to be easy
- Residents cited a lot of technical 'glitches' such as information not loading or forms not being available for download while using digital tools
- Online registering for recreational programs is difficult, confusing, not mobile friendly, and hard to add many sessions to the cart.
- Extreme delays in response to email queries or nothing at all.
- Long wait time on the phone or ending up getting voice mail.
- Calls are not returned.
- The website is not user-friendly, and it is very hard to find information on staff to contact, property issues, new green bins, garbage tags, baseball, feeding wild animals, etc.
- Difficulty reaching the right people at specific departments.
- The current process of one property tax bill for three installments is frustrating because it's easy to forget the date, hence paying late payment fees.
- Obtaining refunds for rec programs is very difficult both online and in-person.
- Notifications of Town events, closures, and planning are put in the IFP only. People in Acton are not notified.
- Inconsistent responses regarding the same issue.
- A few respondents mentioned that they must contact their Councillors to address their issues.

Key Customer Service Preferences

- Residents want to be an informed partner to the Town; appreciate when they are communicated and consulted about issues, new developments, or changes within the Town
- Most preferred methods of interaction are self-serve (complete tasks independently) (38.5% of respondents) and on-demand support (have access to resources/help when required) (38% of respondents)
- Having a single point-of-contact is important to customers (78.2% selected important / very important) when interacting with the Town.

- Almost half of respondents (48.9% of respondents) are likely to utilize a digital tool to engage with the Town

Most important things needed when interacting with the Town:

- Efficiency, clarity, and accuracy.
- Staff must be well equipped with information to assist customers to get resolutions to their concerns.
- In-person interaction with real human beings rather than automating everything.
- Answers to questions should be in plain simple language not technical speak.
- Proper routing of phone calls and timely follow-up.
- A more explicit list of departments, contacts, and committees on the website.
- Find a place on the website to submit requests, concerns, etc.

Reasons why people consider the Town to be business friendly:

- The Town provides funding options.

Reasons why people consider the Town to be not business friendly:

- Review process takes too long.

Participants want the Town to focus on the following in the future to improve customer service:

- Website: it needs to be easy to navigate, user-friendly, and accurate.
- Online Tools: The Town needs to take a business lens approach, create a central one-stop-shop customer service portal, and have someone available for online live chat seven days a week.
- Answering inquiries: prompt answers to requests/inquiries are required, and on-hold times on the phone must be reduced.
- More in-person services: some folks can't handle technology and feel left out.
- More marketing for recreational activities and simplified online registration. Adding videos on how to sign up for a rec program would be helpful.
- By-laws should be updated and enforced.

Additional comments/suggestions:

- Many respondents described the Town staff as professional, courteous, and helpful. Some names were mentioned for their exceptional customer service such as Melissa Wilson at the Gellert.
- Sports and youth organizations need to be a priority. The lack of acceptable training facilities and support from Halton Hills drives them to participate in other communities. The rental of school gyms, rinks, and outdoor facilities is way more expensive than in other municipalities.
- Speeding must stop.
- A movie theatre is needed.
- Re-open saunas after Aquafit in Acton.
- A larger hospital is needed.
- There is no one to speak to about animal services in the town. That is an underserved area.
- All government employees should be completing customer service aptitude tests.
- As was the case during the pandemic, permanent Zoom-based Yoga classes and other fitness classes should continue.
- The amount of cannabis stores in town is so unnecessary as we need other stores selling vitamins, good food, etc.

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- Automatic email reminders to renew burn permits every year.
- Concerns regarding the hazardous placement of some road signs.
- Why won't the Town accept credit card payments toward property taxes? This is the norm in most municipalities.
- Lack of Seniors Apartment accommodation.
- Crackdown on bad graffiti and paint the town with some bright colours.
- Clean the lake and relocate the geese.
- More trash containers in park entrances and exits and by mailboxes.

3.0 Service Delivery Review

The Town of Halton Hills Service Delivery Review component of this initiative includes key findings and observations across 1) Overall Organization, 2) Cross-Functional Service Delivery and 3) Individual Department level of detail.

The finding and observations are used to identified Cost & Efficiency Recommendations as well as Strategic Recommendations that are found within the accompanying Customer Service Strategy Report.

4.0 Overall Organization Service Delivery

The following insights represent overarching organizational findings that impact multiple service units. It is expected that cost / efficiency opportunities found at this overall level will have impacts within individual departments.

General Findings & Observations

- Customer Service Strategy
 - There is a lack of overall guiding strategy and approach to drive customer service best practices effectively across all service touchpoints.
 - There are no formal customer service policies / procedures that exist at the organizational level (i.e., responding to customer inquiries, escalation of customer issues, communications with customers, etc.)
 - A hybrid work model was introduced during the pandemic with a new hybrid policy announced which can support employees in delivering services from various locations, increasing digital capabilities and flexibility.
- Customer Service Roles & Responsibilities
 - Some form of Customer service function / role is found across all departments.
 - Internally, this can cause challenges with balancing core-work responsibilities and customer inquiries.
 - Externally, this can cause confusion with knowing who and where to connect for desired service.
- Cross-Functional Collaboration
 - Collaboration can be difficult when delivering some services and is not streamlined because there is not a clear understanding amongst employees as to what services and knowledge departments / roles deliver. This can cause significant time / effort from large amounts of customer transfers as well as involvement of multiple employees when they may not be needed.
- Municipal Facilities
 - Geographically spread-out facilities can make accessing services difficult for customers as they may not have easy access (specifically Townhall).
 - Individual Board Rooms and meeting spaces within facilities (specifically Townhall) are not utilized to their full capacity and can be leveraged for various customer meetings / virtual consultations which can increase efficiencies in delivering services. There are available spaces that can be used to schedule virtual consultations with customers and should be looked at as a more cost-efficient option than doing major renovations to accommodate this desired service channel moving forward.

Services Offered

The Town of Halton Hills offers a comprehensive list of services to the community and different stakeholder groups. These services are in line with comparable municipalities. A complete list of the Town of Halton Hills Service Inventory can be found throughout the departmental sections as well as cumulative list in Appendix IV.

Service Channels Utilized

- Overall, services are offered across multiple channels providing customers with in-person, phone, email, mail, fax, and online options.
- The consistency to which services are available across channels is not standardized and what customers are able to complete across channels is limited due to the current technology tools.
 - For example, not all services are able to be paid via online channels (although the majority are). Also, some application forms for services can be completed online while others can only be partially completed online.

Services Levels & Measures

- There are no formal service-related performance measures defined or being tracked consistently at the organizational level.
 - Examples of this include Customer Satisfaction Score, Net-Promoter Score, Customer Effort Score, etc. Customer feedback is being captured through surveys, events, consultations, but are done as one-off initiatives and the insights are not utilized to drive decision making.
- Operational service levels / volumes for most offerings delivered to customers are being tracked giving a sense of the quantity being completed.
- Examples of this include permits / applications, registrations, sales, online forms, inspections, etc.
- Excluding phone calls, key customer-related activities and interactions are not being tracked organisationally (i.e., inquiries, interactions, emails, in-person visits, etc.). Currently this is not being done in a way that is formalized, structured and available to cross-functional roles who can access and use the information to support them when interacting with repeat customers.

Formalized service levels and measures are not consistently tracked across the organization. Some key levels uncovered during the review that are impactful to service delivery include the following.

Business Unit	Service	Annual Volume
Multiple Units	Completing Business Licenses	103
Multiple Units	Completing Dog License Requests	168
Multiple Units	Resolving Customer Inquiries & Complaints (Mitel - Calls)	101,880
Online Services	Number of Online "Forms" Submit by Customers	9,043
Online Services	Number of Website Page Views	2,925,651

Internal Processes

- Only few key service-processes are documented or formally defined within departments resulting in increased effort, confusion and inconsistencies in service delivery due to an uncertainty in how employees should be completing tasks.
- In general, cross-functional processes for services requiring collaboration of employees are not documented or formally defined resulting in increased effort and delays when delivering services.
- With various entry-points and channels to the Town, the lack of processes to follow and IT system to track customer interactions can cause customers to connect with multiple employees for the same need resulting in duplication of effort from employees.

- Service processes requiring manual tasks are found across many customer-facing services (tracking information, completing requests, updating status, etc.) and internal support services (processing documents, financials, etc.)

Service Technology & Tools

There have been well known and addressed data security issues which have placed a significant strain on current tools / systems for service delivery. This has been an ongoing issue with plans for mitigation and resolution already being executed.

Gaps in Current IT Infrastructure

- Managing the overall IT infrastructure has been challenging as departments may make purchase decisions without involving the Information Technology Services unit and therefore can be bought and implemented as a “one-off” without taking into consideration the overall integration of the technology stack and longer-term planning.
 - Because of this, multiple technology systems / tools are utilized across departments causing challenges in transparency, information sharing, and automation of service processes.
 - The Town is currently in the mid stages of implementing CityWorks which is a work order system for maintenance type services. This is planned to be utilized across multiple departments anywhere that manages or maintains assets of any kind and can be a valuable upgrade to track customer interactions and processes with the Town for certain services.
- There is currently no CRM-style system being utilized causing major challenges with managing customer issues / inquiries resulting in very significant increase in amount of effort spent when interacting with customers. Some departments have created in-house tools to address this issue, but it is being done on a case-by-case basis.
 - The lack of overarching CRM style system is also impacting the lack of current system / tool in place to effectively capture, analyze and report on any customer performance measures. Current performance measurements are being done manually on a on-by-one basis meaning little baseline data exists with no data governance or warehousing.
- There is no document management system / platform that is being effectively utilized consistently across the organization. The inconsistency in how employees use / access documents, information, updates, and communications cause significant increases in amounts of time / effort when trying to complete services.
 - There is a training element that is not being delivered that would support employees being aware of what functions these systems are cable of and how to use them most effectively.

Challenges with Existing IT Systems

- Internet quality and personal hardware quality have a very significant impact on delivering digital services.
 - Externally, customers may not have access to digital tools to complete online services.
 - Internally, employees may not have reliable internet connections when working from home and some facilities do not have appropriate and reliable access to internet connects.
- IT systems tracking functions are not up to date / aligned with departmental service activities (i.e., AMANDA is currently tracking “infrastructure – customer service interactions” for customer contacts, but there is not Infrastructure specific department / business unit.
 - For example, “Publisher” is not currently available for Microsoft Teams which makes document sharing very challenging.

Service Training & Resourcing

From a resourcing perspective, headcount for the organization includes 474 part-time and 314 full-time positions as of June 2022. For skilling up the staff compliment there are various training opportunities available, but there is no formal service-focused training delivered continuously at the organizational level. Service-related training is provided in some departments / roles, but this is done with varying curriculum and skill development.

Challenges with Service Training

- Some cross-training is being done for teams to be more agile and cover roles when needed but this is not being done consistently across the organization.
- Technical training is lacking with a very inconsistent level of capabilities of employees for utilizing systems / tools and following expected steps to execute tasks.
- There is a skill gap for “analytics” capabilities and need appropriate resources that can setup, analyze and report-out data-models to effectively leverage captured data to inform planning and decision making moving forward

Challenges with Resourcing

- In general, there are resource capacity concerns with employees feeling strained to be able to deliver the quantity of services, at the quality level wanted, in the timeframe expected. This is expressed for the day-to-day operations of departments / teams. The issue is further amplified when there are seasonal or spikes in service volumes as well as employee time-off.
- There are limited support resources for employee’s reference tools and support guides.
- Service volumes / levels can experience significant fluctuations with high peak time-periods which can cause even greater strain on capacity
- In general, employee roles whose core job-function does not include customer-facing activities can be involved in high amounts of customer inquiries / issues causing a significant drain on time.
 - For example, “Plan Review” are often interrupted by in-person or phone inquiries coming from customers. Although it is expected that there will be some customer interaction within these roles the volume and reason for interacting is currently very high.
- The opposite of this can also be found where employee roles whose core job-function is customer-facing activities can be involved in high amounts of “back-office / admin” tasks that takes them away from answering frontline interactions in a timely manner.

4.1: Overall Organization Cost & Efficiency Recommendations

The following table outlines identified recommendations and the potential cost and efficiency savings associated with each. Some items may not have a defined “efficiency” saving as they are aligned with strategic recommendations and are improvement opportunities to either mitigate future costs or to improve the customer service experience.

#	Challenge	Recommendation	Category	Strategy Alignment	Efficiency Savings (Hrs)	Cost Savings (\$)
1	Wide range of abilities and approaches to using the IT systems and/or tools / templates throughout the Town causing lots of time / effort to follow up with employees, fix errors, etc.	Provide continuous training to appropriate employees on technical skills relating to the use and execution of service activities being completed.	Decrease Task Duplication	Employee Training	51 - 100	> \$5,000
2	Lack of knowledge of role responsibilities across various departments and what can be completed within different teams. This has resulted in additional work effort to complete tasks across teams and transferring requests to wrong employees.	Develop knowledge bank of updated roles / responsibilities for all staff that can be accessed and referenced easily leveraging digital tools.	Streamline Activities	Systems Transformation	51 - 100	> \$5,000
3	Frontline staff spend significant time / effort trying to locate information and figure out answers when supporting customers for answers that may be over complicated and not something that the specific employee should be required to complete.	Provide virtual consultation and separate service desk options to customers to reduce time spent by Service Halton Hills employees trying to find information and provide answers to more complicated inquiries / issues.	Streamline Activities	Facility Design		
4	The effective gathering, organizing, and reporting on data is a challenge for individual departments. There is no Business Analytics type resource currently who can own these activities and complete in the most effective and efficient way.	Hire a Business Analyst role to be responsible for organizational data capture, organization, analysis, and reporting. This will be increasingly important as the Town looks to increase its capture and measure service-related data/ information.	Mitigate Future Cost	Employee Training		
5	Minimal customer information is being tracked to understand volume, details, and	Leverage AMANDA system or procure a new system to	Streamline Activities	CRM System		

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	status of interactions with the Town across departments.	increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).				
6	Various point-of-sale vendors utilized across the organization causes challenges with integrating into Great Plains	Consolidate all Town Point-of-Sale (PoS) Systems to a single vendor to streamline financial administration activities	Streamline Activities	Systems Transformation		
7	Not all payments are able to be done online / self-serve (i.e., associations payments for facility bookings) causing increased volumes of customer contacts for employees to complete these tasks	Digitize all payment functions to be completed via online / self-serve tools.	Increase Self-Serve Volume	Online Services	500+	\$10,000 - \$25,000
8	From an Employee perspective: Customer service standards / levels, approaches, and quality can vary wildly depending on the individual departments / teams causing inconstant service delivered and employee confusion for expectations.	Define service standards that are realistic and achievable. Incorporate these into performance measurements for employees to be able to track and ensure they are being met. Create singular service standards, measures and training that can be deployed across all departments.	Improve Service Experience	Service Standards		
9	From a Customer perspective: Customer service standards / levels, approaches, and quality can vary wildly depending on the individual departments / teams causing inconstant service delivered and employee confusion for expectations.	Define service standards that are realistic and achievable. Promote these externally to the community to ensure there is alignment in expectations	Improve Service Experience	Service Standards		
10	Balance of Customer Service activities and core job functions is difficult. Same staff that are not primarily responsible for frontline customer service are answering complaints and calls from various channels.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of	Streamline Activities	Service Centralization	201 - 500	\$5,000 - \$10,000

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		contact and which are required to be triaged for support.				
11	Customers self-direct themselves to wrong departments because they don't know who they need to speak with to resolve their issue or they get tired of waiting in the automated IVR and select any number to be directed to a live person.	Modify IVR of telephony system to provide key services available to be completed (i.e., make a payment, obtain a permit, etc.). Remove the ability for direct contact into departments other than Service Halton Hills to reduce unnecessary call volumes across the organization.	Streamline Activities	Systems Transformation	101 - 200	\$5,000 - \$10,000
12	Numerous online forms and service abilities are not integrated into their appropriate system (i.e., AMANDA, CityWorks, Xplor) and are therefore not being tracked and/or must be entered manually by employees requiring time / effort.	Integrate online forms into existing systems to automatically capture and track the inquire and decrease the time / effort placed on employees to manually enter.	Streamline Activities	Systems Transformation	201 - 500	\$10,000 - \$25,000
13	Customer complaints / issues that require escalation can end up involving numerous different employees and require increased time / effort.	Define escalation process for who is involved and the activities to be completed so that only those that need to be involved are included.	Decrease Task Duplication	Service Standards	51 - 100	\$10,000 - \$25,000
14	Customer inquiries / complaints come into the Town from numerous channels directly to various employees across all departments. This makes it very challenging for the Town to manage customer interactions and track information. Multiple employees will be involved in a customer inquiry when it may have been able to be completed by one person. Customers will also connect with the Town multiple times for the same issue which additional employees will spend time. effort completing the same need.	Centralize the customer service function at the Town and enhance the role of Service Halton Hills.	Decrease Task Duplication	Service Centralization	201 - 500	\$50,000+

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15	Navigation of the website and information found within it will not always meet customer needs and therefore increase the volume of contacts into the town for customers to get the information they seek.	Update website with sections that have the most pressing information and high-volume interactions to reduce interaction volumes into the Town for simple requests.	Increase Self-Serve Volume	Online Services	201 - 500	\$25,000 - \$50,000
16	For some services / applications (i.e., road occupancy permit) Customers are required to find the appropriate form online, download the .PDF file, print out the .PDF file, fill out the form, scan the completed form, upload to their computer, and email back to the Town (or submit hardcopy via mail / in-person / fax).	Digitize all form submissions so they can be completed end-to-end online without having to jump to different service channels.	Increase Self-Serve Volume	Online Services	201 - 500	\$10,000 - \$25,000

5.0 Cross-Functional Service Elements

The following insights represent findings for key service elements impacting the overall organization and multiple departments / service units. It is expected that cost and efficiency opportunities found at this level will have impacts within individual departments.

Strategic Partnerships

The Town is currently leveraging strategic partnerships for service delivery.

- One partnership is through Access Halton (via 311) which provides limited 24/7 customer service activities for Halton Hills that can reduce service volumes for customer interactions. Access Halton is the first point of contact for Halton Region programs and services via telephone, website, email and walk-in. 311 programs often have partnership models and can have varying tiers of support than can be offered.
- Another partnership is the after-hours call line currently in place with a third-party vendor to receive real-time calls directed to the shift worker who is on-call or voicemail messages to the general inbox. The service is only available for Public Works services and is not easily found on website or known by customers.

Service Halton Hills “Desk”

Service Halton Hills is a partly centralized service model that was implemented with creation of physical service desk operated by the Service Halton Hills team, located at Townhall.

- There are not formally defined and documented service levels agreements (SLA’s) that detail which services and information is to be given at Service Halton Hills and the process to triage when necessary. This can cause employees spending a lot of time / effort to try and support for an inquiry that may be very technical then transferring to the right employee who will duplicate the effort to resolve the issue
 - For example, Service Halton Hills is the payment processing point at Townhall, but they will send some tax inquiries to the tax department, after discussions with the tax department customers get sent back to Service Halton Hills to make any required payments.
- Staying up to date on departmental changes to services and current information is a major challenge with employees often having to involve other members to confirm information or get accurate details from recent changes.
- Service Volumes have been tracked manually with in-house tool (.XSL), but not done consistently as the core job function of staff takes priority over completing these tracking tasks.
- Employees balancing their focus between delivering service desk (in-person), phone /email, and internal administration tasks can be a challenge and increase time / effort when having to jump back-and-forth between these roles.
- Service Halton Hills physical desk and phone line can be easily by-passed allowing customers to contact departments directly causing disruptions for various departmental service desks to support and direct to the appropriate employee.

Mitel Telephony System

The current telephony offering from Mitel is a basic tier of functionality.

- In general, the system provides the necessary functionality for employees to utilize as a phone service as needed.
- Mitel system currently tracks detailed phone activities / volumes automatically. However, it is generally not seen as useful information and therefore, not effectively utilized or known by

departments to understand service levels and resourcing needs. (additional, data tracking could be for knowing call transfers and which employees they are sent to.)

- There are limitations to data tracking as you can't categorize the purpose of call (must be done manually). As well, identifying the number of transfers needs to be done manually.
 - Examples of some tracking functionality includes the following.
 - Average wait time = 12 seconds
 - Average duration = 2.00 minutes
 - Average abandon rate = 10%
 - Average went to voicemail = 20%
- Voicemail messages can often be missed / delayed in responding because headsets do not show any notification. The email notification capability for telling employees of a new voicemails is not working for all employees and some were not aware of this function being available.
- Issues with "softphones" working properly have required employees working from home to forward their desk phones to personal cells. This can cause challenges with separating work and personal calls.

Website / Online Platform

Website capabilities are an ongoing issue for municipalities and Halton Hills does offer comparable services at a comparable level of quality. There has been customer feedback around the significant improvement made to the website over the past few years, but additional capabilities are desired.

- A wide range of online services exist but are not comprehensive with a lot of ability to be expanded. For example, there is the ability to download permits / forms, make requests, et. but the services are typically one-way and don't allow for customers to completely self-serve (employee interaction is still highly required to process)
- Integration of online services into existing systems is limited and can often require manual inputting of information. Forms and information that can be started online are not always able to be completed end-to-end across this channel and require manual activity to be completed.
 - For example, online forms are not directly input into AMANDA, forms are able to be downloaded online but then must be filled out manually, etc.
- In general, customers cite the Halton Hills website is difficult to navigate and find the information or service wanted. The search function is not very effective causing difficulties for staff and customers to find information efficiently.
 - There can be many customers who are not aware of the online services currently offered even though it would be their preferred method. The Communications team has been planning a campaign aimed at promoting online services but have not been able to deploy due to other more pressing IT issues.
- LetsTalk Halton Hills has been a phenomenal platform for gathering feedback and engaging with customers and should continue to be leveraged as the central tool for public engagement.

6.0 Individual Department Service Delivery

The following insights represent findings for key individual departments. It is expected that cost / efficiency savings opportunities are built upon the Overall Organization and Cross-Functional Service Elements found above.

6.1: Office of the CAO

The Office of the CAO delivers a broad range of services and programs that ensure the efficient, effective, and equitable delivery of Town business. The department is made up of three divisions: Clerks; Communications, and Strategic Initiatives.

Detailed Service Inventory

Business Unit	Service Activity
CAO/Mayor's Office	
	Provide direct access to mayor for constituent questions and concerns
	Provide coordination for information between other levels of government
	Escalate customer complaints to the CAO
Clerks	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Manage Communications and Activities Processes between Elected Officials and Public
	Manage End-to-End Investigation, Administration and Enforcement Process for Bylaw Related Issues
	Own the End-to-End Execution of By-Law and Parking Enforcement Activities
	Complete Administration Process for Specific Permits / Licenses / Registrations
	Manage Payment Process for Various Services / Enforcement Activities
	Own the Management and Execution of Activities for Service Halton Hills Desk*
*Service Halton Hills Desk	Team is within Clerks Business Unit
	Provide General Information and Support for Customer Inquiries Across Departments
	Manage Resolution of General Customer Issues and Complaints Across Departments
	Own the General Phonenumber and Email Inboxes for Halton Hills
	Triage Incoming Community Connections to Appropriate Departments / Employees
	Manage Application Process for Various Licenses and Permits to Community Members
	Manage Payment Process for Various Services
	Manage Process for Death Registry & Burial Documents
	Provide Commissioning Services for Documentation to Community & Internal Departments
	Process Invoices for Other Internal Departments that Don't Have Service Desks

Corporate Communications	
	Provide Information and Support for Customer Inquiries
	Own the Development, Review and Deployment of Formal Internal / External Communications Content
	Manage Website & social media Online Platforms
	Support Departments with Internal / External Communications, Public Consultation Activities and Training
	Manage Corporate Advertising Program
Strategic Initiatives	
	Lead the End-to-End Design, Planning, Management and Delivery of Organization-Wide Strategic Projects
	Support Departments with Designing, Planning and Executing Specific Strategic Initiatives
	Liaise with Municipal Partners and External Stakeholders to Engage / Align on Approaches for Areas of Interest

Service Levels & Measures

Formalized service levels and measures are not consistently tracked within the department. Some key levels uncovered during the review that are impactful to service delivery include the following.

Business Unit	Service	Annual Volume
Clerks	Completing Payments for Various Services	260
Clerks	Completing Various Permits / Licenses / Applications	520
Clerks	Completing Death Registry & Burial Documents	364
Clerks	Resolving Customer Inquiries & Complaints	6,760
Clerks	Resolving Enforcement Issues	1,304
Clerks	Actioning Parking Exemptions	3,195
Clerks	Issuing Parking Tickets	5,450
Clerks	Parking Tickets Paid by Customers	4,687
Communications	Number of Website "Tickets" Submit by Employees	1,000
Service Halton Hills	Completing Payments for Various Services	7,800
Service Halton Hills	Managing Various Applications & Permits	1,040
Service Halton Hills	Resolving Customer Inquiries & Complaints	2,860
Service Halton Hills	Triaging Incoming Customer Connections	6,240

Internal Processes

- Administrative Assistants who are customer facing will receive a wide range of customer inquiries / issues from community members who are looking to connect straight with the “top”. This can cause additional transfers or follow-ups to get the right information / employee involved from the right department.
- Escalations of customer inquiries through elected officials can cause delays in delivering service / communications to existing customers and confusion amongst employees on how to prioritize what activities to complete
- Bylaw enforcement processes are not clear and can cause confusion with employees from efficiently involving the right cross-functional employees at the right time. This can cause delays and back-and-forth to complete review / investigation activities.

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- Customer inquiries relating to enforcement can take extended periods to explain and educate residents (30-40 minutes). This time could be cut down if there was an accessible outline provided online that detailed some of this information.
- Review of messaging/public-facing materials by Communications team staff is often required to be completed under very tight timelines causing strain on employees to complete tasks within current workloads.
- There is an inconsistent use of Spiceworks system for submitting website tickets to the Communications team which can lead to difficulties in managing numerous review tasks efficiently.
- Communications team employees deal directly with the public via social media handling queries, comments, and direct messages; these interactions are time sensitive, demanding prompt responses due to the nature of this platform.
 - Informally, Communications team members share information with Service Halton Hills staff when there is a specific or frequently asked issue / inquiry but there is no documented process for information sharing.
- Aligned with Online Service capabilities, the initial application for marriage certificate is online, but then requires manual intervention to complete which causes added time / effort of employees.

Service Technology & Tools

- Third party online option for paying of parking services enables customers to completely self-serve and not interact with town employees which significantly reduces effort placed on delivering the service.
- The recently implemented Administrative Monetary Penalty System (AMPS) has been effective at streamlining parking enforcement services as a faster and more flexible process for payment, appeal, and collection of parking penalties
- Website complaints are not automated to import directly into Customer inquiries into parking / tickets coming from website must be input manually into system to track requiring additional time / effort. Previous system being used had the ability to capture notes and input directly into system which enforcement officers could view.
 - The current system does not have the functionality to capture notes for enforcement officers to reference and is being done manually in excel then sent individually to each officer.

Service Training & Resourcing

- Parking enforcement coordinators are limited and do not have the time to effectively oversee large geographic areas.
- There were no department specific training needs identified but would benefit from being exposed to the overall organization training opportunities.

6.1.1: Office of the CAO Cost & Efficiency Recommendations

The following table outlines identified recommendations and the potential cost and efficiency savings associated with each. Some items may not have a defined “efficiency” saving as they are aligned with strategic recommendations and are improvement opportunities to either mitigate future costs or to improve the customer service experience.

#	Business Unit	Challenge	Recommendation	Category	Strategy Alignment	Efficiency Savings (Hrs)	Cost Savings (\$)
17	Clerks	Website complaints are not automated to import directly into Customer inquiries into parking / tickets coming from website must be input manually into system to track requiring additional time / effort. Previous system being used had the ability to capture notes and input directly into system which enforcement officers could view. Current system does not have the functionality to capture notes for enforcement officers to reference and is being done manually in excel then sent individually to each officer.	Enhance system functionality to reduce the amount of manual intervention required from employees and increase the information sharing across roles.	Streamline Activities	Systems Transformation	0 - 50	> \$5,000
18	Clerks	No record management system to digitally store and efficiently access files (i.e., mayor letters)	Obtain a Document Management System to effectively store key Town records and formal collateral.	Streamline Activities	Systems Transformation		
19	Clerks	The Service Halton Hills team needs a very wide knowledge base to address all customer service inquiries causing lots of time to try and look up the information or back and forth	Identify a formal "Service Contact" within every department to act as the primary point of contact for centralized Service Halton Hills	Decrease Task Duplication	Service Centralization	101 - 200	\$10,000 - \$25,000

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		with customers to connect them to the right employee.	team to collaborate with when delivering services				
20	Communications	Multiple points of contact for inquiries and complaints	Centralize customer inquiries / complaints into a single-entry point - expand customer inquiry handling via social media channels to Service Halton Hills team. Comms still owns Let's Talk Halton Hills platform and triage inquiries to Service Halton Hills or appropriate department.	Decrease Task Duplication	Service Centralization	101 - 200	> \$5,000
21	Communications	Can be a lengthy and cumbersome review / validation process for communications collateral submit by other departments	update policy to ensure there are clear requirements for what typed of communications content is required to be reviewed by the Communications team and expectations for turnaround times.	Decrease Task Duplication	Service Centralization	0 - 50	> \$5,000
22	Communications	Major fluctuations in effort levels (month over month) and very tight turnaround times for content reviews from things submit by other departments	Update policy to ensure there are clear requirements for what typed of communications content is required to be reviewed by the Communications team and expectations for turnaround times.	Streamline Activities	Service Level Standards	0 - 50	> \$5,000
23	Communications	Ticket-program for desired website changes is not being utilized by most employees.	Update policy to require use of this system and process when asking for website changes to decrease the strain on team employees.	Streamline Activities	Service Level Standards	51 - 100	> \$5,000
24	Communications	AODA reference tools and job aids not being utilized by employees causing time / effort strain on Comms team	Formalize AODA polices and reference tools. Include in update Document Management System.	Decrease Task Duplication	Systems Transformation - Updated Document	0 - 50	> \$5,000

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					Management System		
25	Clerks (enforcement)	Misalignment with other departments on responsibilities for who owns the customer relationship for specific tasks and how to prioritize urgent matters / sense of urgency of tasks (i.e., inspections for Engineering).	Define team / employee role responsibilities to have distinct processes that each are required to complete and how the transfer of responsibility needs to take place.	Decrease Task Duplication	Employee Training	0 - 50	> \$5,000
26	Clerks (enforcement)	Inconsistency of which services can be tracked and managed though the AMANDA system. Wide range of what information is inputted into AMANDA.	Integrate additional permit / application processes into AMANDA (i.e., Business Renewal permits should be done in the same manner as Dog Licenses)	Streamline Activities	Systems Transformation	0 - 50	> \$5,000
27	Clerks (enforcement)	Enforcement team can spend significant time / effort managing customer inquiries which is a challenge due to hours being limited. Currently experiencing influx of complaints and cannot focus time / effort on proactively mitigating customer concerns.	Provide frontline Service Halton Hills employees with access to view updated information about the status and details of enforcement complaints to streamline information sharing and responding to inquiries.	Streamline Activities	Systems Transformation	0 - 50	> \$5,000
28	Clerks	Current Team has high amounts of customer contacts across various channels. Many can be difficult to resolve quickly or may require analysis which is a challenge to complete while maintaining the volume of other incoming inquiries.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be triaged for support.	Decrease Task Duplication	Service Centralization	0 - 50	> \$5,000

6.2: Corporate Services

Corporate Services represents critical functions related to Human Resources, Information Technology Services, Purchasing and Risk Management and Finance that in turn support and enhance the delivery of effective and efficient Town services.

Detailed Service Inventory

Business Unit	Service Activity
Purchasing & Risk Management	Provide Information and Support for Customer Inquiries
	Manage Insurance and Risk Management Program
	Manage Issuance and Procurement Process for Proposal Bids & Tenders
	Manage and Support Departments on Purchasing / Surplus Assets (not to be confused with surplus property) / Inventory Matters / Internal Courier
Information Technology Service	Manage IT Help Desk Service
	Provide Internal IT Deployment and Support to Employees / Teams
	Manage Internal IT Infrastructure / Telephony and Data Gathering / Reporting
Human Resources	Manage all Recruitment, Hiring and Onboarding of New Staff Hires
	Develop and Facilitate Training / Employee Engagement Activities
	Assist with Employee and Labour Relations Activities
Finance	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Manage Billing, Payments / Collection and Administration of Property Taxes and Rebates / Deferrals
	Create Financial Statements and Annual Financial Public Documents
	Manage the Processing and Reconciliation of Invoices / Financial Ledgers
	Manage Non-Tax Related Vendor and Accounts Receivable Financials
	Support Departments on Finance-Related Planning, Charges, Grants and Applications

Service Levels & Measures

Formalized service levels and measures are not consistently tracked within the department. Some key levels uncovered during the review that are impactful to service delivery include the following.

Business Unit	Service	Annual Volume
Finance	Completing Purchase Orders (PO)	207
Finance	Number of Tax Payments Received	122,132
Finance	Processing Invoices	26,152

Internal Processes

- The utilization of Service Halton Hills was expressed as a common internal positive.

- The accepting and processing of tax payments by Service Halton Hills and their ability to triage appropriate calls has been a highpoint overall.
- Internal Finance operations have a lack of standardization for process of inputting financial data into Great Plains system. Multiple departments are responsible for this activity and have their own methods which can cause increase rework and revisions from Finance team.
- For Human Resources, an applicant tracking system is being looked at to streamline the recruitment process but is currently very manual and labour intensive.
- Within Purchasing, templates exist for services related to tenders, quotes, and proposal, but are not being followed consistently – old templates are often used which requires rework and revisions to complete.
- A lack of Purchasing related procedures is also seen for staff with purchasing cards who often do not complete reconciliations / approvals on time which causes increased time / effort to follow-up and track down individuals do they are completed.

Service Technology & Tools

There is a critical need for systems integration specifically within Finance of this department.

- AMANDA and Great Plains are not integrated to share information effectively – lots of manual activities with employees often having to pull data, put into excel in a more usable format, then send to the employee who requested the information. All of which increases the amount of time and effort needed to be spent on these activities.
- There is no singular corporate Point-of-Sale system / provider. Across departments there are upwards of seven different systems in use which can cause integration challenges to provide standardized accurate data for accounting purposes. Manual intervention is often required.
- Employees must reconcile project costing monthly due to lack of integration into the FMW system. It is not possible to generate a smart list for this reconciliation because the list gets too big.
- There is an initiative being planned to implement an online portal for customers to manage their property taxes with the Town. This is looking to begin implementation in 2023 and is seen as a positive initiative to support self-serve capabilities. The current lack of online portal for property tax information and management by customers causes increased inquiries into the department to address general needs
- Billing services for property taxes is a very paper-based and manual process. 22,000 bills will be sent out via mail, twice a year. Employees must complete the printing, sorting, stuffing, and postage placing a significant strain on capacity for other activities.

Service Training & Resourcing

- Fluctuations in service-volume cause peak times that are difficult to handle effectively with current capacity.
- There were no department specific training needs identified but would benefit from being exposed to the overall organization training opportunities.

6.2.1: Corporate Services Cost & Efficiency Recommendations

The following table outlines identified recommendations and the potential cost and efficiency savings associated with each. Some items may not have a defined “efficiency” saving as they are aligned with strategic recommendations and are improvement opportunities to either mitigate future costs or to improve the customer service experience.

#	Business Unit	Challenge	Recommendation	Category	Strategy Alignment	Efficiency Savings (Hrs)	Cost Savings (\$)
32	Purchasing & Risk Management	Standard practices are not being followed, such as templates / tools for tenders, quotes, and proposals or vendor performance reviews causing potential errors and duplication of work.	Effectively store updated templates / tools in one centralized area through the HILLS webpage or by obtaining a document management system.	Streamline Activities	Systems Transformation	0 - 50	> \$5,000
33	Information Technology (IT) Services	Individual systems implemented per department causing a lack of understanding to the alignment of each system into the overall technology infrastructure	Require consultation of IT team members in the discussions and planning of al potential IT purchasing	Mitigate Future Cost	Systems Transformation		
34	Finance	Various departments and employees are involved in processing financial / payment information causing inconsistencies in how it is reported, the quality of information and how it sent to Finance. This is greatly increasing the amount of time / effort required by all involved.	Centralize payment processing (i.e., reconciliation and organizing of reports / data files to be sent to Finance) to a single team to ensure consistency and efficiency in completing. Collaborating can be limited between this team and Finance to action any issues.	Streamline Activities	Service Centralization	201 - 500	\$5,000 - \$10,000
35	Finance	Billing services for property taxes is a very paper-based and manual process. 22,000 bills will be sent out via mail, twice a year. Employees must complete	Outsource property tax billing process to third party	Mitigate Future Cost	Systems Transformation		

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		the printing, sorting, stuffing, and postage placing a significant strain on capacity for other activities.					
36	Finance	Great Plains is not integrated to share information effectively with other payment / financial systems (i.e., AMANDA, Xplor, G-Techna). Lots of manual activities with employees often having to pull data, put into excel in a more usable format, then send to the employee who requested the information.	Enhance integration functionalities between key systems to reduce time / effort required to manually reconcile financial information.	Decrease Task Duplication	Systems Transformation	500+	\$25,000 - \$50,000
37	Finance	Significant high volume of customer inquiries can be for relatively simple property tax needs which takes a considerable amount of time effort from employees.	Continue with the planned design and deployment of a Customer Portal for Property Tax services (i.e., information, statements, key information) to decrease the volume of customer inquiries into the Town	Increase Self-Serve Volume	Online Services	201 - 500	\$25,000 - \$50,000

6.3: Business, Environment & Culture

Business, Environment & Culture was introduced as a departmental reorganization in 2022. The new department includes climate change, asset management, economic development, culture, affordable housing, equity, diversity and inclusion, truth and reconciliation.

Detailed Service Inventory

Business Unit	Service Activity
	Provide Information and Support for Customer Inquiries (Public / Business Community)
	Manage SharePoint CRM for Business, Development, Stakeholder, and Investment tracking
	Lead and manage the Community Improvement Plan programs
	Manage Economic Development and Tourism Websites, E-Letters, and social media Online Platforms
	Provide Internal / External Information and Advice on Diversity, Equity & Inclusion Within the Town
	Manage and Execute Activities within Halton Hills Tourism Program
	Develop and Deliver Cultural Programing / Initiatives
	Manage Community Engagement / Volunteer Opportunities
	Lead the Organization-Wide Climate Change Program including Energy retrofit grants
	Lead the Organization-Wide Asset Management Program

Service Levels & Measures

Formalized service levels and measures are not consistently tracked within the department. Some key levels uncovered during the review that are impactful to service delivery include the following.

Business Unit	Service	Annual Volume
	Resolving Customer Inquiries & Complaints	3,120
	Some "Public Engagement" levels are being tracked but is not done consistently	

Internal Processes

- The governance structure and collaboration requirements for review processes and socializing of information between the Communications team are not formally documented. This lack of clarity can cause duplication of work and delays in posting content. There is ownership of websites and social media platforms for this department, but it is not always known when the Communications team is required to be involved.
- There is a lot of cross-functional coordination with other departments when delivering services. Challenges can arise when there isn't a clear understanding of what each department / role is responsible for which can increase the amount of time / effort spent finding information or answers to inquiries.

Service Technology & Tools

- The department and team members will receive insightful and valuable feedback from customers / employees through their day-to-day interactions, but do not have an effective tool / system to capture this so that it is digested by the team and actioned to improve on what was heard.

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- Many surveys are deployed to obtain customer insights, but they are done as a “one-off” and there is no central database of these findings or an understanding of how they should be reviewed and discussed so they can be actioned.
- Participation rates in public engagement initiatives is an ongoing challenge to maintain and grow. Allowing for multiple channels to participate and leveraging the virtual consultation capability will be particularly important moving forward.

Service Training & Resourcing

- Most employees are working from home and have been able to take advantage of the hybrid work environment. Challenges can arise with the social aspect and keeping new hires connected through onboarding.
- Further training to employees on Equity, Diversity, and Inclusion topics are desired as the Town population a diversity increases.

6.3.1: Business, Environment & Culture Cost & Efficiency Recommendations

The following table outlines identified recommendations and the potential cost and efficiency savings associated with each. Some items may not have a defined “efficiency” saving as they are aligned with strategic recommendations and are improvement opportunities to either mitigate future costs or to improve the customer service experience.

#	Business Unit	Challenge	Recommendation	Category	Strategy Alignment	Efficiency Savings (Hrs)	Cost Savings (\$)
35		Difficulty with coordination between departments for the management and communications of stakeholder groups (i.e., Business, Tourism, Volunteers, etc.) causing time / effort spent to track down status / information from other internal teams.	Leverage AMANDA system or procure a new system to increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).	Decrease Task Duplication	CRM System	201 - 500	\$5,000 - \$10,000
36		Difficulty getting things reviewed / approved by cross-functional departments (with CIP) causing lots of time / effort spent on follow ups. Also causes delays to customers.	Digitize "approvals" processes to allow tracking of status and defining of deadlines to keep these activities moving forward during the desired turnaround time.	Streamline Activities	Systems Transformation	0 - 50	\$5,000 - \$10,000
37		Employee time / effort spent collaborating with teams when supporting customers who do not know what rooms can be booked, amenities available, or where they are, and how to access - need better understanding of what resources are available	Modify current IT Systems to ensure Business, Environment & Culture teams as well as Parks & Recreations teams have access to the same up-to-date information that can be relayed to customer when inquiring	Decrease Task Duplication	Systems Transformation	51 - 100	\$10,000 - \$25,000

6.4: Transportation & Public Works

The Transportation & Public Works Department has four divisions that deliver services and programs to enhance and build the community. Services range from building permit administration to code enforcement, development review, design, construction and maintenance of core infrastructure, and integrated transportation.

Detailed Service Inventory

Business Unit	Service Activity
Building Services	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Manage the Review and Issuance Process for Specific Permits / Approvals
	Collaborate with Customers to Facilitate Inspections Related to Permitting
	Lead Enforcement of the Building Code Act
	Manage the Sewage System Maintenance Inspection Program
Public Works	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Manage Payment Process for Various Services
	Manage End-to-End Execution of Requests for Maintenance-Services from Customers
	Own the Management and Execution of Maintenance for Town Assets (i.e. Fleet, Equipment, Facilities)
	Own the Management and Execution of Various Seasonal Maintenance Activities (i.e., Grass Cutting, Snow Removal)
	Manage the After Hours Call Service with Vendor and Triaging of Calls to Appropriate Departments
Transportation	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Manage & Facilitate the Delivery of ActiVan / Taxi Scrip Operations to Customers
	Manage Payment Process for ActiVan / Taxi Scrip Related Services
	Manage Maintenance Activities for Transportation Related Resources
	Support Planning and Design of Traffic Operations and Flow
	Manage Planning and Public Promotion / Education Regarding Transportation
	Manage School Crossing-Guard Program
Engineering & Construction	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Develop Public Communications Content on Plans, Studies and Upcoming Projects
	Own the Planning, Design and Construction Process for Major Infrastructure Projects with Vendors
	Own the Development of Engineering Research Studies

	Perform Surveying and Utility Locates
Development Engineering	
	Process and Manage Entrance / Excavation Permits
	Manage Site Alteration Permitting and Enforcement

Service Levels & Measures

Formalized service levels and measures are not consistently tracked within the department. Some key levels uncovered during the review that are impactful to service delivery include the following.

Business Unit	Service	Annual Volume
Building Services	Actioning Violations	77
Building Services	Completing Building Permits	867
Building Services	Completing Customer Service Interactions	307
Building Services	Completing Permit Inspections	6,275
Development Engineering	Completing Entrance / Road Occupancy Permits	51
Public Works	Completing Service Requests	2,241
Public Works	Resolving Customer Inquiries & Complaints	2,560

Note:

- Service levels / volumes are prone to significant fluctuations due to unavoidable circumstances such as weather, ongoing projects, etc.
- Regulatory requirements drive the service levels and turnaround times of many permit-related service activities

Internal Processes

- A frequent and common issue for comparable municipalities is the communities understanding towards the responsibilities of the “region” versus the “town” which can cause increased volumes of inquiries and time / effort of employees to resolve.
- The department can be a major channel for incoming customer issues / complaints, particularly those involving maintenance and seasonal grass cutting / snow removal activities/
 - This can lead to employees who may not be primarily responsible for frontline customer service activities shifting focus to resolve complaints at the expense of other activities
- For Building Services, the permit process is heavily paper-based and manual, taking up significant time / effort of employees and physical storage space. The current process includes the Inspections coordinator creating active files, storing files for filing, and archiving after the front end has issued the permit and inspections are ultimately completed.
- Employees are particularly challenged with balancing workloads associated with the design / review of complicated plans and permits with being accessible to general customer inquiries. Jumping back-and-forth between competing tasks can significantly increase the amount of time taken to complete priority workflows.

Service Technology & Tools

Building Services has plans to offer digital submission of applications, but currently applicants must submit as a paper document through mail or in-person drop off.

- Alongside the digital submission, there are plans to develop electronic plans review process which could greatly reduce employee time / effort.

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- At peak times, Transportation receives a high volume of customer inquiries that are not relevant to their division and requires customers to be transferred.
- The current telephony IVR system utilizes ActiVan high on the list (#2), which causes customers to press so they don't have to wait. This results in multiple employees getting involved in directing customers to the right area / person.
- ActiVan, Taxi Scrip, Split Pass and Parking services are offered across various channels, but there is a lack of consistency for individual services to be completed the same way (i.e., online payments available for other services but not Split Pass).
- Not all payment for services run through the Point of Sale (PoS system and therefore must be tracked manually increasing time / effort and potential for rework due to errors.

Service Training & Resourcing

- Robert C Austin Operations Centre is currently closed to public, but may open doors for walk-ins. However, services offered are all able to be completed within Town Hall which is across the street. This can reduce resource requirements for delivering in-person service as well as enable to facility to be leveraged for virtual consultations.
- Providing up-to-date and easily accessible education / information / resources for customers to reference is challenging which causes increased inquiry volumes for relatively simple needs.
- There is soft-skill training administered to supervisors / lead hand positions and most union employees with public-facing interactions.
- Some mentorship-based learning and development activities are being completed for customer-facing positions; more seasoned employees with customer service experience will anecdotally educate new hires on how to deal with different customer interactions.
- Difficulty with recruiting for specialized building official roles; hybrid work may increase talent pool and provide option to hire outside of Town.

6.4.1: Transportation & Public Works Cost & Efficiency Recommendations

The following table outlines identified recommendations and the potential cost and efficiency savings associated with each. Some items may not have a defined “efficiency” saving as they are aligned with strategic recommendations and are improvement opportunities to either mitigate future costs or to improve the customer service experience.

#	Business Unit	Challenge	Recommendation	Category	Strategy Alignment	Efficiency Savings (Hrs)	Cost Savings (\$)
38	Building Services	Process for issuance of permits includes paper-based files which requires significant resources to create, distribute and archive.	Digitize permitting process to allow for electronic document management and communications for employees	Streamline Activities	Systems Transformation	101 - 200	> \$5,000
39	Building Services	Process for completing permits includes paper-based and manual tasks that are then taken on by employees to execute. These same paper and manual channels require significant resources to create, distribute and archive.	Digitize permitting process to allow for customer self-serve capabilities when completing applications and submitting documents Note: Single system between Building Services and Development Review teams is required to ensure there is streamlined workflows.	Increase Self-Serve Volume	Online Services	500+	\$25,000 - \$50,000
40	Engineering & Construction	Difficulty responding to 'one-off' customer phone calls / inquiries without any previous knowledge of the issue causing time / effort to learn about the need, research it and try to provide an answer (all starting from scratch).	Leverage AMANDA system or procure a new system to increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).	Streamline Activities	Systems Transformation	0 - 50	> \$5,000
41	Engineering & Construction	No dedicated GIS resource to pull reports. This is a legislative requirement and needs to be maintained.	Cross-train team employees so more capacity can be devoted to these activities or hire dedicated GIS resource	Improve Service Experience	Employee Training		
42	Engineering & Construction	Legislation on utility locates changed causing an increase in workload to physically be	Cross-train team employees so more capacity can be devoted to these activities or update job	Improve Service Experience	Employee Training		

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		on site and complete this service.	descriptions, so it is a part of more team members roles.				
43	Building Services	Balance of Customer Service activities and core job functions is difficult. Same staff working on permits / applications are answering complaints and call from various channels.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be triaged for support.	Streamline Activities	Service Centralization	201 - 500	\$10,000 - \$25,000
44	Development & Engineering	Balance of Customer Service activities and core job functions is difficult. Same staff working on detailed plans are answering complaints and call from various channels.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be triaged for support.	Streamline Activities	Service Centralization	51 - 100	\$5,000 - \$10,000
45	Public Works	Difficulty tracking customer inquiries resulting in missed follow-ups and increased time / effort in tracking down information or status to relay to customers.	Leverage existing system or procure a new system to increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).	Decrease Task Duplication	CRM System	201 - 500	\$25,000 - \$50,000
46	Public Works	After hours customer inquiries and contacts through this channel (third party vendor) is not integrated into AMANDA.	Integrate third party information captured from After Hours service into AMANDA / CRM system.	Streamline Activities	CRM System	51 - 100	> \$5,000
47	Public Works	Managing customer reports and requests coming through social media is difficult because the channel is not integrated into current systems (i.e., AMANDA, CityWorks).	Prior to deploying centralized service model and technology infrastructure, savings can be achieved in the short-term by integrate social media channels into Public Works workflow management systems. This will remove work effort from Communications team members	Decrease Task Duplication	Systems Transformation	101 - 200	\$5,000 - \$10,000

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			and allow for the department and employees to be responsible for managing this channel. This can also reduce the number of employees that are responsible or actioning social media inquiry before getting to public works.				
48	Transportation	No Point-of-Sale (PoS) system to run tickets or sales through when completing transactions.	Leverage existing Xplor system functionality and capacity to consolidate all Town Payments / Point-of-Sale (PoS) Systems to a single vendor to streamline financial reporting and administration activities.	Improve Service Experience	Systems Transformation	500+	\$25,000 - \$50,000
49	Public Works	Public Works building not open for in-person services that some residents use (recycle bins, ActiVan tickets, garbage tags)	Allow for services being done at Public Works building to be completed at Town Hall so that the building can remain closed moving forward. This decreases the number of customer entry points, promoting centralization.	Mitigate Future Cost	Facility Design		
50	Public Works	Public Works building not open for in-person services that some residents use (recycle bins, ActiVan tickets, garbage tags)	Enhance online services for recycle bins so they can be purchased and shipped to customer s directly without interaction from Town employees	Increase Self-Serve Volume	Online Services	51 - 100	\$5,000 - \$10,000
51	Transportation	Senior's request receipts: manual process to pull receipts and photocopy for customer requesting details of Taxi / ActiVan purchases.	Digitize and automate receipt generation process for customers utilizing Taxi / ActiVan services. Can also be made available online to decrease Town employee's effort for this task.	Streamline Activities	Systems Transformation	101 - 200	\$5,000 - \$10,000

6.5: Recreation & Parks

Recreation and Parks is responsible for the delivery of quality programs, services, and facilities to improve the quality of life for its residents. The department has four divisions and is the most front-facing service provider in the Town.

Detailed Service Inventory

Business Unit	Service Activity
Parks & Open Space	
	Provide Information and Support for Customer Inquiries
	Develop Content for Public Communications and Artefacts
	Manage the Acquisition, Planning, Design and Construction of Open-Space Capital Projects (new / Improvements)
	Manage the Review and Approval Process for Development Applications
Facilities	
	Provide Information and Support for Customer Inquiries for Each Facility
	Manage Resolution of Customer Issues and Complaints for Each Facility
	Lead the Management and Day-to-Day Execution of Service-Operations in all Facilities (Individual Facility Level)
	Manage the Design and Construction of Major Facility Capital Projects / Assets (new / Improvements)
	Own the End-to-End Maintenance and Asset Management in all Municipal Facilities (at the Individual Facility Level)
Community Development	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Own Community Engagement Initiatives to Build Relationships, Collaboration and Partnerships
	Support and Manage Customers in the End-to-End Special Events Process
	Coordinate with Departments to Organize Completion of Applications and Permits for Customer Events
	Own the End-to-End Development, Management and Delivery of Formal Town Events
	Manage Volunteer Workforce and Scheduling of Parks / Schools
	Manage Community Grant Program
Facilitate Consultation Sessions with Community and Volunteer Groups	
Recreation Services	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Complete Recreation Program Registration Process for Customers
	Complete Facility and Open Space Booking / Renting for Customers
	Complete Cemetery Related Sales and Services Activities
	Manage Memberships & Punch Passes
Manage Payment Process for Various Services	

	Own the End-to-End Design, Management and Delivery of Community Partnerships / Programs
	Oversee the Management and Day-to-Day Execution of Service-Operations for all Recreation Facilities
	Own End-to-End Recreation Online Platforms, Marketing Materials and Communications
	Own the Relationship, Management and Execution of Recreation Services for Public Associations / Groups
	Develop New Programming / Interaction Opportunities for Customers
	Manage Memberships & Punch Passes
	Manage Payment Process for Various Services
	Complete Recreation Program Registration Process for Customers
	Complete Facility and Open Space Booking / Renting for Customers

Service Levels & Measures

Formalized service levels and measures are not consistently tracked within the department. Some key levels uncovered during the review that are impactful to service delivery include the following.

Business Unit	Service	Annual Volume
Recreation	Completing Marketing & Communications Tasks	1,820
Recreation	Completing Payments for Various Services	24,544
Recreation	Completing Recreation Program Registration	14,560
Recreation & Facilities	Resolving Customer Inquiries & Complaints	20,384

Note:

- The defining of key KPIs and performance measures is looked to be developed within the Customer Satisfaction initiative
- Some tracking of levels is trying to be done manually via self-built excel files, but is not done consistently and is a very manual activity

Internal Processes

As a department. The level of maturity and sophistication for service delivery is above most others with many artefacts developed to support customer service.

- Key examples include.
 - There is a Customer Satisfaction Strategy initiative planned to be developed and a Project Charter has been completed. This includes a Results Based Accountability Framework which will perform customer feedback research.
 - There are numerous detailed process maps that have been documented for key service activities. However, the employee understanding of them and the utilization to drive standardized, streamlined activities is not consistent.
- Although the hours of operation are far extended within facilities then the general Townhall (8:30-4:30pm Mon to Fri.), further after-hours support is not available. This can cause many emails / messages waiting for employees in the morning.
 - Although it is not recommended to provide full-service 24 hours a day, leveraging a similar strategic partnership as Public Works to offer a form of basic call service could decrease the backlog of customer contacts waiting for employees every morning.
- Because the customer service staff at each facility are working under the facility supervisor, there is often a lot of back and forth between the “office-based” employees and the facility manager.

- Information sharing processes are challenged to provide facilities with “refreshed / up to date” information for service staff to relay to customers. There can often be customers who come in knowing about a certain Rec & Parks promotion that staff have yet to be informed on which causes increased time / effort for employees to investigate
- Layout of service counters within some facilities can cause bottlenecks and congestion of customers.
- There is a high volume of customer calls into Parks & Open Space for operational services due to 311 directing customers to the incorrect extension. This is not something that is completed by the team anymore. Public access to this phone number results in employees having to transfer many calls and redirect emails.

Service Technology & Tools

Recreation Services uses main systems (Xplor, My Senior Centre, Volunteers management) which are not integrated and must be handled separately for delivering and processing services. There are issues with the accuracy of data capture tracking within Xplor which requires manual intervention to review and revise.

- Facilities do not currently offer digital self service, e.g., kiosks or tablets that would allow patrons to complete basic tasks without requiring staff.
 - Wi-Fi quality at some facilities is poor which can impact the ability to deliver digital services for employees or access to digital services by customers.
- There are challenges with the way customer information is stored and accessed. Customers interacting for special events and/or recurring services are required to “start from scratch” and employees must spend the time / effort to work with them to provide the same information multiple times.
 - Although Xplor is used for program registration, memberships/passes, facility rentals, etc. the needed customer information is not always captured and/or employees are not aware causing them to gather all the information again from customers.

Challenges with Existing Systems

- Program attendance is tracked manually by instructors requiring increased time / effort. The digitization of this process through could drive efficiencies.
 - A pilot project for digital management of attendance is being deployed early 2023 which may be a great opportunity to close this gap.
- Customers can’t pay group invoices online due to limitations within the software which is causing increased volumes for in-person payment and processing of cheques.
- The systems for cemeteries and school-booking services require manual intervention for information to be input more than once.
- Service activities related to box office sales have a manual process where it is first posted into an excel file, then that file is posted into Great Plains. This is done monthly and is very time consuming.
- For Community Development, Community groups interacting across multiple channels can be hard to manage and are currently being “tracked” via tools such as OneNote which requires increased time / effort to keep updated and review by employees.

Opportunities to Note

- Customers find the Parks & Recreation brochure very valuable. The development requires significant resources to complete and distribute as a paper-based artefact.

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- Although this has not been developed in physical form for the past few years, it is important that the Town are able to identify the appropriate balance to delivering a great customer experience and managing service delivery costs.
- For Parks & Open Space and Community Development teams, the implementation of CityWorks looks to digitize and streamline asset management type tasks which can decrease time / effort when completing these service activities.

Service Training & Resourcing

There is some department specific training that exists for certain key areas impacting service delivery.

- There is a Customer Service Training module within HR downloads but is not comprehensive or used consistently.

There are resourcing considerations specific to the department that include the following.

- In-facility interactions with customers can often be lengthy, taking an employee away from supporting any other services often without appropriate coverage.
- There is a current dependency on volunteers to run senior / youth centre service desks.

6.5.1: Recreation & Parks Cost & Efficiency Recommendations

The following table outlines identified recommendations and the potential cost and efficiency savings associated with each. Some items may not have a defined “efficiency” saving as they are aligned with strategic recommendations and are improvement opportunities to either mitigate future costs or to improve the customer service experience.

#	Business Unit	Challenge	Recommendation	Category	Strategy Alignment	Efficiency Savings (Hrs)	Cost Savings (\$)
52	Recreation	Employee time / effort spent supporting customers because they do not know what rooms can be booked / amenities / where they are and how to access - need better understanding of what resources are available	Enhance website functionality and ease of access to allow for up-to-date information on all available facilities, rooms, and other services. Provide detail for status of availability and ability to complete end-to-end need (i.e., research, book, pay, and confirm). Improving promotion and facility information have been identified improvements and are planned for 2023.	Increase Self-Serve Volume	Online Services	201 - 500	\$10,000 - \$25,000
53	Community Development	Lack of consistent approach and process for on document storage / governance.	Obtain a Document Management System to effectively store key Town records and formal collateral	Streamline Activities	Systems Transformation		
54	Parks & Open Space	Receive many inquiries that are not able to be completed by current team due to outdated information and phone numbers still available community members (i.e., department does not do any operations type tasks anymore).	Centralize customer inquiries / complaints into a single-entry point. Review external platforms and communications systems (i.e., website) to update / remove specific "contact information" available to the public.	Streamline Activities	Service Centralization	0 - 50	> \$5,000
55	Recreation	Responsibilities for management of marketing activities and social media	Modify role responsibilities between Communications and Recreations teams to maximize	Decrease Task Duplication	Service Centralization		

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		channels is difficult to keep up with due to limited resources.	synergies in similar tasks being completed. Minimizing the need for multiple review cycles for department then Communications team can decrease effort requirements. Leveraging existing Marketing / tracking type tools (i.e., Hootsuite) for recreation to be responsible for can remove steps in engaging with recreation customers.				
56	Recreation	Customer service standards, levels approaches, and quality can vary wildly depending on the individual recreation facility causing inconstant service delivered and employee confusion for expectations.	Define service standards that are realistic and achievable. Incorporate these into performance measurements for employees to be able to track and ensure they are being met. Create singular service standards, measures and training that can be deployed across all facilities	Improve Service Experience	Service Standards		
57	Recreation	Paper brochure for Parks & Recreation requires a significant amount of time / effort to complete and resources for the copy and management of printing.	Although the paper version of the brochure has not been offered for the past few years, it is recommended to digitize annual brochure so it can be more easily socialized and delivered to customers at less cost (printing can be made available if requested by customers)	Mitigate Future Cost	Online Services		\$10,000 - \$25,000
58	Community Development	Special Events support for customers can require transfers when collaborating across different departments for the various permits needed causing increased time and effort to follow up and	Leverage AMANDA system or procure a new system to increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).	Decrease Task Duplication	CRM System	101 - 200	\$5,000 - \$10,000

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		when "picking up" new applications. This also means a disjointed and confusing process for the customer who will call in more frequently to address questions.					
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6.6: Planning & Development Services

The Planning & Development Department develops and implements plans, programs and services that enhance and build the Town community. Services include the development of policy documents, the review of development applications filed under the Planning Act, and the preparation of various legal agreements.

Detailed Service Inventory

Business Unit	Service Activity
Development Review & Committee of Adjustment	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Manage End-to-End Administrative Function of Development Application Process (OPA/ZBA/Site Plan)
	Manage End-to-End Administrative Function of Development Application Process (Committee of Adjustment)
	Own the Management and Execution of Plan / Zoning Bylaw Amendment Process
	Lead the Urban Design / Planning of Subdivisions and Condominiums
	Coordinate with Halton Area Development Managers (HADM)
Policy, Heritage, and Information Services	
	Provide Information and Support for Customer Inquiries
	Manage Resolution of Customer Issues and Complaints
	Support Development and Management of the Town Official Plan / all Secondary Plans
	Manage Updates to & Creation of Comprehensive Zoning Bylaw
	Perform Long-Term Planning Studies to Inform Policy / Heritage
	Perform GIS-Related Assessments and Analysis for Planning Purposes
	Facilitate Public Consultations to Gather Input and Feedback when Developing Plans
Legal	
	Provide Information and Support for Customer Inquiries
	Support and Advise Departments on Legal Subject Matter impacting Permits / Services Delivered to Customers
	Review and Respond to Compliance Requests
	Prepare Development & Non-Development Agreements / Documents (incl. Licenses and Leases)
	Coordinate Registration of Subdivisions and Land Acquisitions / Dispositions

Service Levels & Measures

Formalized service levels and measures are not consistently tracked within the department. Some key levels uncovered during the review that are impactful to service delivery include the following.

Business Unit	Service	Annual Volume
Development Review	Completing Reviews & Approvals	124
Overall	Resolving Customer Inquiries & Complaints	1,040

Note:

- Planning Act regulations set many of the required service standards and turnaround times.
- Many services can be long-term and complex in nature making the setting of “general” service standards very difficult.

Internal Processes

- In general, there are varying levels of customer knowledge, understanding and ability to complete forms / documentation accurately. This wide range in capabilities can be difficult to manage internal delivery requirements in alignment with customer expectations.
 - There can be a significant amount of time spent by employees on educating, following up and communicating with customers dependent on their experience level.
- A lack of defined internal processes and supporting technology systems for tracking information can pose challenges when trying to provide service to a customer that was previously being supported by a different employee. This will often require a significant amount of time / effort to get “caught-up” to support the inquiry.
- There is currently a dependency on external agencies in some of the permit / application process which can cause delays, bottlenecks, and increase time / effort spent to follow-up on the status of completion date.
- Current processes do not provide employees with effective control over the quality and completeness of what is being submitted by customers. Also, with the multiple entry points to connect with employees it can be difficult to manage customers along the required steps / tasks in a streamlined manner.
 - Customers submitting multiple forms and/or submissions that don’t follow guidelines require added employee effort to the work cycle; employees are required to circle-back with customers (often numerous times) to accurately process submissions.

Service Technology & Tools

- Face-to-face interactions and an in-person service channel are an important aspect to service delivery for the department, providing organic learning / dialogue and relationship building.
 - Use of Let’s Talk Halton Hills platform has been a positive experience for completing the various public consultation activities performed, but digital channels should not fully replace the opportunity to connect “live”.
- Customers are not able to digitally submit applications increasing the number of manual tasks required and the time / effort required to manage customers throughout the process.
- The digitization of processes has a significant amount of potential to decrease time / effort spent by employees. Due to the collaborative working service relationship for internal departments, it is important that there be a single system between Building Services and Development Review teams to ensure there are streamlined workflows.
 - The lack of digital capabilities for the end-to-end application process puts increased strain on employee time / effort when having to externally address incoming customer inquiries and internally collaborate / share information with colleagues.
 - In general, there is a lot of paper-based aspects to planning / review services, significantly increasing the amount of time / effort to complete tasks and manage end-to-end service delivery.

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- The drop off process of paper-based applications is being used by customers, however there is an increase in the number of manual tasks and effort required by employees who are responsible for processing submissions through this paper-based channel.

Service Training & Resourcing

- Accessibility to employees with specialized knowledge is needed by customers to complete many of the services offered within the department due to their complex nature.
- The complexity of service interactions has resulted in employees spending extended time to process / resolve a single customer interaction. Educating customers in “real-time” can take a significant amount of time for employees. Having resources to provide customers may be able to minimize the length of these interactions.
- Complicated nature of services delivered requires specialized skills and knowledge which will minimize the number of interactions that can be handled by supporting customer service teams (i.e., centralized Service Halton Hills model).

6.6.1: Planning & Development Cost & Efficiency Recommendations

The following table outlines identified recommendations and the potential cost and efficiency savings associated with each. Some items may not have a defined “efficiency” saving as they are aligned with strategic recommendations and are improvement opportunities to either mitigate future costs or to improve the customer service experience.

#	Business Unit	Challenge	Recommendation	Category	Strategy Alignment	Efficiency Savings (Hrs)	Cost Savings (\$)
59	Development Review & Committee of Adjustment	Process for issuance of permits includes paper-based files which requires significant resources to create, distribute and archive.	Digitize permitting process to allow for electronic document management and communications for employees	Streamline Activities	Systems Transformation	0 - 50	> \$5,000
60	Development Review & Committee of Adjustment	Process for completing permits includes paper-based and manual tasks that are then taken on by employees to execute align same paper and manual channels which requires significant resources to create, distribute and archive.	Digitize permitting process to allow for customer self-serve capabilities when completing applications and submitting documents Note: Single system between Building Services and Development Review teams is required to ensure there is streamlined workflows.	Increase Self-Serve Volume	Online Services	201 - 500	\$5,000 - \$10,000
61	Policy, Heritage & Information Services	Resident disputes over developments within Town can be difficult to manage due to volume and completing on top of other core job functions.	Share customer inquiry / complaint activities with centralized customer service function through transparent and accessible tracking mediums (i.e., CRM System). This will reduce the volume of incoming contacts to the department.	Streamline Activities	Service Centralization	0 - 50	\$5,000 - \$10,000
62	Policy, Heritage & Information Services	Differing / competing expectations from developers and the public stakeholders’ groups on what involvement each	Develop clear guidelines and policies that outline the engagement hat stakeholders’ groups will have in the consultation process. Allow for	Improve Service Experience	Service Standards		

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		should have in the planning consultation process	feedback and input from stakeholders to ensure they are included in this process.				
63	Development Review & Committee of Adjustment	Lack of standardization / clear processes resulting in multiple submissions and submissions not following guidelines which increases employee effort to review and follow up with customers to fix their errors	Digitize the application process to allow for more efficient review tracking and communications to customers. Can also provide training sessions / tools for customers on the process.	Streamline Activities	Systems Transformation	201 - 500	\$5,000 - \$10,000
64	Development Review & Committee of Adjustment	Balance of Customer Service activities and core job functions is difficult. Same staff working on permits / applications are answering complaints and call from various channels.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be triaged for support.	Streamline Activities	Service Centralization	51 - 100	> \$5,000

6.7: Emergency & Fire Services

The Halton Hills Fire Department is a Composite Fire Service providing an all-hazards response capability to natural and human caused events from three strategically located stations. Based on the Ontario Fire Marshal’s three lines of defense, this divisions provides: Public Fire Safety Education and Prevention, Fire Safety Standards and Enforcement, and Emergency Response.

Detailed Service Inventory

Business Unit	Service Activity
Public Education	Provide Information and Support for Customer Inquiries
	Facilitate Safety-Related Educational Programs, Activities and Training to Public
Inspection and Enforcement	Perform Fire-Safe Inspections for Permit / License Applications to Commercial and Residential Customers
	Manage and Facilitate the 'Home Safe Home' Voluntary Inspection Program
	Manage Fire & Safety Aspect of Business License Reviews
	Complete Burn and Fireworks Permit Application Process
Emergency Management	Own and Maintain the Town’s Emergency Response Plan
	Ensure Compliance with Emergency Management & Civil Protection Act
Emergency Response	Provide Various Fire, Safety and Medical Emergency Services to Customers
	Facilitation of the Superior Tanker Shuttle Accreditation

Service Levels & Measures

Formalized service levels and measures are not consistently tracked within the department. Some key levels uncovered during the review that are impactful to service delivery include the following.

Business Unit	Service	Annual Volume
Emergency Response	Many services related to emergency response are tracked. These services are not being looked at from a “customer service” perspective.	N/A
	The department will keep some impactful positive / negative emails from customers and share-out at meetings to inform on customer sentiment.	N/A

Internal Processes

- As a department, the information / knowledge sharing of critical updates can be labour intensive and is a manual process, needing to communicate to other departments / teams individually.

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- Collaborating with other departments for safety-related support on permitting can be challenging with a lot of back-and-forth required due to confusion on timelines / expectations for when tasks will be completed.
- High volume of burn / firework permits completed within the department can require a lot of time / effort from administrative staff.

Service Technology & Tools

- The current Firehouse RMS is planned to be replaced by new ERS (Emergency Reporting Software).
- The current records management system is poor requiring increased time / effort to locate, manage, and share documents.

Service Training & Resourcing

- Training is unique for this department and is guided by legislative duties. Ongoing training is administered but is role specific and not focused on customer service.
- Increased strain on resources delivering support and services for Fire Safety Plan Review, Business Licenses, etc. due to the growth in building and therefore volume of required building services being completed.

6.7.1: Emergency & Fire Cost & Efficiency Recommendations

The following table outlines identified recommendations and the potential cost and efficiency savings associated with each. Some items may not have a defined “efficiency” saving as they are aligned with strategic recommendations and are improvement opportunities to either mitigate future costs or to improve the customer service experience.

#	Business Unit	Challenge	Recommendation	Category	Strategy Alignment	Efficiency Savings (Hrs)	Cost Savings (\$)
65		Providing fire / safety permit services to customers can take a significant amount of time / effort as there are often spikes in volumes during peak times.	Allow for fire / safety permits to be obtained at Town Hall and through online services. Promote the use of this to decrease customer inquiry volumes into the department.	Streamline Activities	Online Services	0 - 50	> \$5,000
66		Collaborating with departments to support fire / safety aspects of permits can be difficult as it is difficult to know what tasks are needed to be done and when.	Integration and increase in accessibility of planned new Emergency Response System and AMANDA System can support this increase in transparency and decrease amount of effort spent while collaborating with departments to complete the services.	Streamline Activities	Systems Transformation	0 - 50	> \$5,000

7.0 Conclusion

As seen within this report, the Town of Halton Hills has numerous opportunities to drive cost and efficiency savings within the current service delivery model, and across all departments.

There are common themes that have been uncovered during the service review which have corresponding opportunities that will significantly impact internal savings if implemented. These themes are aligned to the structure of recommendations and relate to reducing the amount of time and effort currently required from employees to complete services.

Streamline Activities

- The manual and labour-intensive activities to support service delivery across departments and offerings has created capacity constraints, necessitating that most effort be focused on day-to-day tasks and little effort being dedicated to larger projects or moving forward on the priorities of strategic municipal plans. Manual intervention has also increased the potential for errors and rework along the process.
- Recommendations aligned to Streamlining Activities aims to remove unnecessary employee involvement, steps / tasks, and manual activities through digitization, automation, and integration of IT systems.

Increase Self-Service Volume

- The lack of end-to-end online capabilities for customers to self-service many of their required interactions with the Town means employees must dedicate capacity to processing “basic” requests.
- Recommendations aligned to Increasing Self-Service aim to scope the technology and process requirements to completely remove employee intervention from executing specific service delivery requests in a consistent manner across the Town.

Decrease Duplicate Tasks

- The general knowledge gap for customer interactions, limited centralized and up-to-date knowledge sharing, and lack of clarity defining the roles / responsibilities of individual departments has resulted in multiple employees being involved in the resolution of a single customer inquiry / issue.
- Recommendations aligned to Decreasing Duplicate Tasks aim to enhance employees’ ability to efficiently execute service delivery through better documentation and access to customer information, improved process transparency, access to an ‘ever green’ centralized knowledge repository, and more comprehensive and consistent communication.

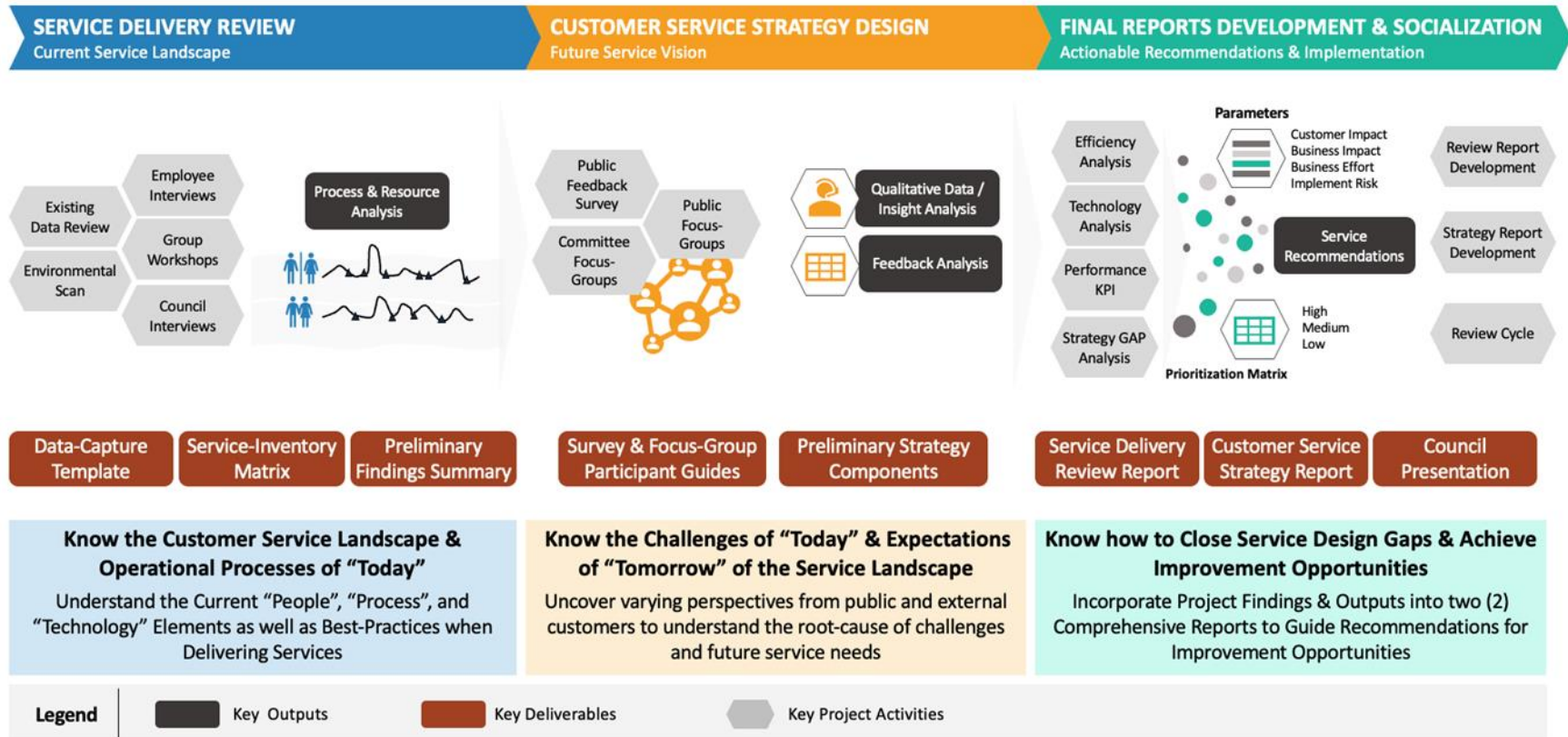
There are “quick-wins” that can drive short-term efficiencies, but they are not the long-term solutions that will setup Halton Hills for sustained success. As the Town looks to scale operations to meet anticipated population growth (and therefore volume of services), the ability to close identified efficiency gaps in service delivery will require an initial investment to foundational IT infrastructure, and definition to processes, procedures, and governance.

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The insights uncovered within the Service Delivery Review have been used as an input to the recommendations found within the subsequent Customer Service Strategy deliverable within this initiative. The Customer Service Strategy will support the Town in future planning towards customer service excellence and includes the holistic picture of service delivery recommendations, how they are incorporated into a modernized customer experience for the community, and the implementation roadmap moving forward.

Appendix

Appendix I: Project Approach Summary



Appendix II: Research Methods Details

Document Review Summary

Data / Document Category	Data / Document Title	Data / Document Description
Organizational Documents		
	2020 Financial Report	
	2020 Budget and Business Plan (Full)	Budget and Business Plan covering all depts & a community profile
	Organizational Charts	Org charts for all depts
	2022 FT Headcount	
	2022 PT Headcount	
	Demographic Info	Links toward Halton Hills demographic info
Strategy Documents		
	Town of Halton Hills Recreation and Parks Strategic Action Plan	November 2020
	Townhall Masterplan	Townhall Masterplan updated as of Feb 2022
	Planning and Development Strategy Reports	This includes reports regarding downtown, Glen Williams Secondary, Mature Neighborhood, Norval Secondary, Southeast Secondary, Cultural Heritage, Premier Gateway Phase 1B, and Vision Georgetown.
	Public Engagement Charter	The Charter speaks to public engagement through the lens of democracy, open dialogue and improving communications.
	Economic Development Strategy Reports	This includes a 2021 report regarding the overarching masterplan for Economic Dev and Tourism; (2021/2022) as well, reports entailing the cultural masterplan and the public art masterplan have also been provided.
	Program Registration and Payment Processes	Charts outlining the process for program registration and program payment
	Business Process Mapping (Parks and Rec)	Within this folder is process mapping for: account credits, aquatic, community development, facility permitting, rec memberships, passes, & sponsorships, subsidy, Hillview Active Living Centre, volunteers, and rec community programs.
Service Delivery Documents		
	Service Halton Hills - Service Delivery, Halton Hills Customer Service	General processes and info to support triaging
	Service Halton Hills - Smartlist Quick Codes	

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	KPI Customer Satisfaction Project Charter	Outlines the project's goals, priorities, deliverables, budget, team etc. (as of April 2021)
	Senior Services Delivery Review	
	Task Analysis - Card Deck Task Analysis	Contains information on Library services, ActiVan services, and recreation services
	Service Delivery Options - TPW	
Technology Documents		
	Corporate Technology Strategic Plan (2018)	
Customer Surveys		
	2011 Citizen Survey Presentation	Contains results from the 2011 citizen satisfaction survey
	2015 Citizen Satisfaction Survey Report	Contains results from the 2015 citizen satisfaction survey
	COVID Business Impact Survey Results	Contains results from the 2020 COVID business survey - in presentation format
	FINAL Survey Results	Contains results from the 2020 COVID business survey - in report format
	2021 Attendee Survey (Halton Hills)	Survey results regarding 2021 Cultural Days participation/experiences - the survey itself w data
	2021 Halton Hills Survey Report	Survey results regarding 2021 Cultural Days participation/experiences
	Acton Non Member Report	Contains the report for the 2019 Hillsview Active Living Centre Non-Member Survey
	Business Concierge Survey Results	Contains the report for the 2017 - 2020 Business Concierge Survey
	Centre Experience 2022	Bare bones survey for center experience 2022
	CIP Programs Completion	Community Improvement Plan (CIP) Feedback Survey results completion
	CMT Benchmarking Report	CMT Benchmarking Report 2015
	Community Improvement Plan Survey Results	Community Improvement Plan (CIP) Feedback Survey results and report
	Culture Days 2020 Halton Hills ON	Survey results regarding 2020 Cultural Days participation/experiences
	Digital Main Street Survey	Report for the Digital Main Street Survey (engages various business along main st)
	Lets Talk Survey - Rec Strat Plan - Survey 1	Contains the results from a survey given out at the 2022 Recreation & Parks Strategic Action Plan Virtual Open House
	Lets Talk Survey - Rec Strat Plan - Survey 2	Contains the results from a survey given out at the 2022 Recreation & Parks Strategic Action Plan Virtual Open House regarding the 'Top 10 Recommendations'
	Lets Talk Survey - Summer Camp - 2021	Contains the report and results for a 2021 Summer Camp Satisfaction Survey
	Resident Virtual Consultation Survey	Contains results from a 'Resident Survey on Virtual Consultations'
	Resident Virtual Consultation Survey - Text Analysis	
	Survey Results	Contains responses from a survey with Clarington, Burlington, Aurora, Newmarket, and Guelph regarding their processes and services
	Youth Centre Survey Links	Contains links to the surveys used by the youth centre (survey only, no data)

Employee Interviews & Workshops Summary

Dept.	Unit	Type	Sub Type	Name	Role
Office of the CAO					
	CAO				
		Strategy	Individual	Chris Mills	CAO
		Service	Group	Fatima Das Neves	Admin Assistants (CAO / Mayor)
		Service	Group	Sherri Anfinson	Admin Assistants (CAO / Mayor)
	Clerks & Legislative Services				
		Strategy	Individual	Valerie Petryniak	Town Clerk Administration
		Service	Group	Renee Brown	Supervisor for the Service Halton Hills Staff
		Service	Group	Alexandra Shirreffs	Customer Service Reps (one of the service reps) 3 total
		Strategy	Individual	Susie Spry	Manager of Enforcement Services
		Service	Group	Crystal Warner	Enforcement Coordinator
		Service	Group	Orlando Donato	Municipal Law Enforcement Officer
	Communications				
		Strategy	Individual	Alex Fuller	Director Communications
		Service	Group	Meagan Cooper	Communications Specialist
		Service	Group	Emily Van Dyk	Website Coordinator
		Service	Group	Dalia Emam	Communications Specialist
		Service	Group	Nancy Field	Communications Specialist
	Economic Development, Innovation & Culture				
		Strategy	Individual	Damian Szybalski	Commissioner of Business Environment and Culture
		Service	Group	Graham Lowe	Developers, new businesses, stakeholders, partners
		Service	Group	Tony Boutassis	Developers, new and local businesses, stakeholders, partners
		Service	Group	Erin Kaiser	Local Businesses, stakeholders and industry partners
		Service	Group	Allison Nap	Tourism
		Service	Group	Catherine McLeod	ED&I Role
		Service	Group	Amy Liddell	Culture General Inquiries

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	Strategic Initiatives				
		Strategy	Group	Dharmen Dhaliah	Senior Manager, Climate Change & Asset Mgmt.
Corporate Services					
		Strategy	Individual	Laura Lancaster	Commissioner of Corporate Services
	Financial Services				
		Strategy	Individual	Moya Jane Leighton	Director of Finance
		Strategy	Individual	Joey Vandermeer	Deputy Treasurer and Senior Manager of Accounting & Taxation
		Service	Group	Lisa Gatto	Property Tax Supervisor
		Service	Group	Carmen Vanderburgh	Tax Analyst
		Service	Group	Michael Porporo	Appeals Analyst
	Purchasing & Risk Management				
		Service	Group	Simone Gourlay	Senior Manager. Purchasing
		Service	Group	Peter Atkinson	Stores Clerk
		Service	Group	Susan Harries	Purchasing Analyst
	Human Resources				
		Service	Individual	Jonna Ison	Director, HR
	Information Technology Services				
		Strategy	Individual	Murray Colquhoun	Director, IT
		Service	Group	Sandra Eremita	Business Analyst
Emergency & Fire Services					
		Strategy	Individual	Jon Rehill	Commissioner & Chief of Fire Services (Fire Chief)
Transportation & Public Works					

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		Strategy	Individual	Bill Andrews	Commissioner of Transportation & Public Works
	Building Services				
		Strategy	Individual	Greg MacNaughtan	Director of Building Services and CBO
		Service	Group	Loris Vaccher	Manager of Zoning & Plans Review
		Service	Group	Eugene Callegari	Manager of Inspections
	Development Engineering				
		Strategy	Individual	Jeff Jelsma	Director of Development Engineering
	Engineering & Construction				
		Strategy	Individual	Michael Donnelly	Director of Engineering and Construction
		Service	Group	Teri Hoey	Supervisor of Construction
		Service	Group	Steven Ziegler	Senior Project Engineer
	Transportation				
		Strategy	Group	Maureen Van Ravens	Director of Transportation
		Service	Group	Deanna Locey	Transit Supervisor
		Service	Group	Romen Kotev	Specialized Transit CSR
	Public Works				
		Strategy	Individual	Mark Covert	Director of Public Works
		Service	Group	Sergio Alamiie	Supervisor - Fleet and Support Service
		Service	Group	Craig Nicolucci	Manager of Operations
		Service	Group	Carmella DiNunzio	Transportation and Public Works (TPW) - PW Admin
Planning & Development					
		Strategy	Group	John Linhardt	Commissioner of Planning & Development
		Service	Group	Bronwyn Parker	Director of Planning Policy
		Service	Group	Jeff Markowiak	Director of Development Review
Recreation & Parks					

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		Strategy	Individual	Paul Damaso	Commissioner of Recreation & Parks
	Facilities				
		Strategy	Individual	Aaron Matthews	Director of Facilities
		Service	Group	Cheryl Bennett	Admin Assistant - Arenas
		Service	Group	Joelle Middleton	Facility Supervisor
	Parks & Open Space				
		Strategy	Group	Kevin Okimi	Director of Parks & Open Space
		Service	Group	Mark Taylor	Senior Landscape Architect
	Community Development				
		Strategy	Individual	Mandy Keller	Senior Manager of Community Development
		Service	Group	Heather Kaufmann	Supervisor - Volunteer & Group Support
		Service	Group	Erin Burger	Supervisor - Event & Neighborhood Support
	Recreation Services				
		Strategy	Individual	Samantha Howard	Director of Recreation Services
		Service	Group	Nancy Dunbar	Supervisor Marketing and Customer Service
		Service	Group	Aaron Knutson	Marketing Coordinator
		Service	Group	Linda Cousins	Sales and Service Coordinator
		Service	Group	Cindy Bodrug	Recreation Administrative Coordinator
Elected Officials					
	Mayor				
		Elected Official	Individual		Rick Bonnette
	Council Members				
		Council	Group		Michael Albano
		Council	Group		Ted Brown

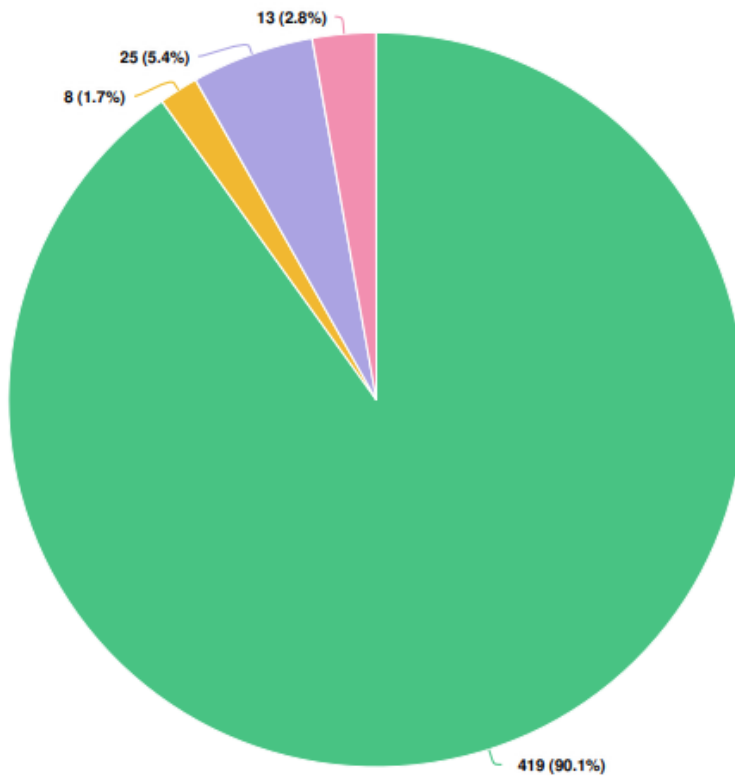
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		Council	Group		Wendy Farrow-Reed
		Council	Group		Jane Fogal
		Council	Group		Jon Hurst
		Council	Group		Bob Inglis
		Council	Group		Moya Johnson
		Council	Group		Ann Lawlor
		Council	Group		Bryan Lewis
		Council	Group		Clark Somerville

Appendix III: Customer Survey Details

Q1 Please indicate which best describes your relationship with the Town of Halton Hills.
Please complete the survey from the perspective chosen below. Questions in this survey will vary depending on which group you select.

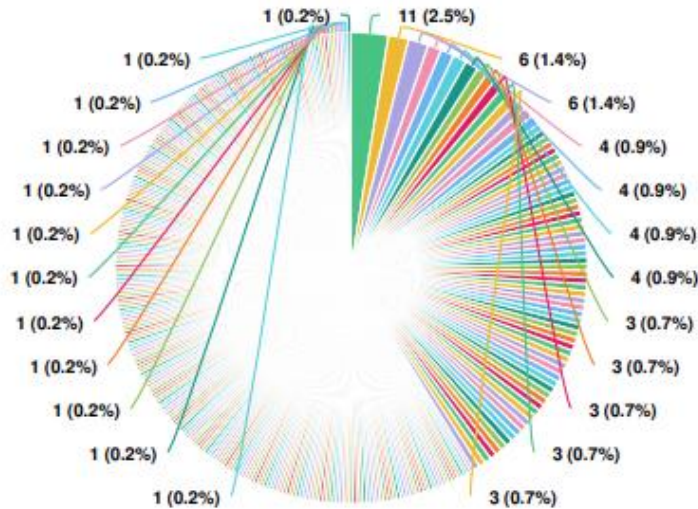


Question options

- I am a resident (e.g., any individual who lives within the Town)
- I am a business and/or development member (e.g., business owner, developer)
- I belong to a public association (e.g., community groups, athletic association)
- Other (please specify)

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Q2 Please provide your postal code.

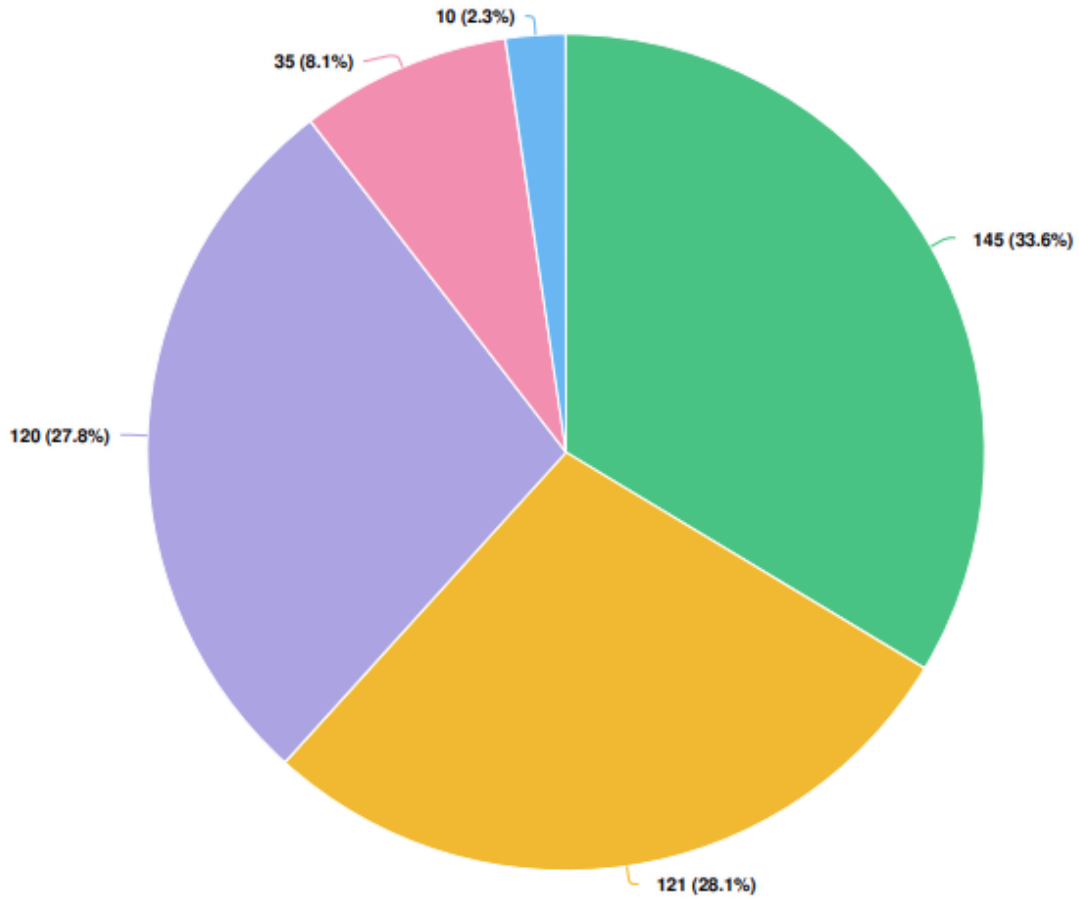


Question options

- Limehouse, ON, L0P1H0
- Acton, ON, L7J2L8
- Georgetown, ON, L7G0G4
- Glen Williams, ON, L7G4S8
- Georgetown, ON, L7G4S4
- Norval, ON, L0P1K0
- Acton, ON, L7J3A8
- Georgetown, ON, L7G5W7
- Georgetown, ON, L7G6B9
- Georgetown, ON, L7G5V6
- Georgetown, ON, L7G6K4
- Georgetown, ON, L7G4S7
- Georgetown, ON, L7G6M6
- Georgetown, ON, L7G5L7
- Acton, ON, L7J2P1
- Georgetown, ON, L7G1L6
- Georgetown, ON, L7G6E4
- Georgetown, ON, L7G1G1
- Georgetown, ON, L7G6C6
- Georgetown, ON, L7G6C4
- Acton, ON, L7J2Z5
- Georgetown, ON, L7G4M6
- Georgetown, ON, L7G4S5
- Acton, ON, L7J0B1
- Acton, ON, L7J1M2
- Georgetown, ON, L7G5S7
- Georgetown, ON, L7G6B7
- Georgetown, ON, L7G4S6
- Georgetown, ON, L7G4Y8
- Georgetown, ON, L7G6M7
- Georgetown, ON, L7G6L8
- Georgetown, ON, L7G5Y8
- Georgetown, ON, L7G4K2
- Georgetown, ON, L7G5C5
- Georgetown, ON, L7G0B6
- Georgetown, ON, L7G6M9
- Georgetown, ON, L7G5H8
- Georgetown, ON, L7G5X9
- Georgetown, ON, L7G0M8
- Georgetown, ON, L7G3W9
- Georgetown, ON, L7G4L6
- Georgetown, ON, L7G0K9
- Acton, ON, L7J1T4
- Georgetown, ON, L7G5H4
- Acton, ON, L7J3A9
- Erin, ON, N0B1T0
- Georgetown, ON, L7G5J1
- Georgetown, ON, L7G5R4
- Georgetown, ON, L7G2Y3
- Acton, ON, L7J1R3
- Georgetown, ON, L7G0C8
- Georgetown, ON, L7G5K2
- Guelph-Eramosa, ON, N0B2K0
- Georgetown, ON, L7G2T7
- Acton, ON, L7J2G3
- Acton, ON, L7J2Z4
- Georgetown, ON, L7G4Y9
- Georgetown, ON, L7G5W4
- Georgetown, ON, L7G2A2
- Georgetown, ON, L7G5P5
- Georgetown, ON, L7G6L7
- Georgetown, ON, L7G5P9
- Georgetown, ON, L7G0H2
- Georgetown, ON, L7G0L6

▲ 1/6 ▼

Q3 Overall, how satisfied are you with the customer service provided by the Town?



Question options

- Very satisfied
- Somewhat satisfied
- Satisfied
- Somewhat dissatisfied
- Very dissatisfied

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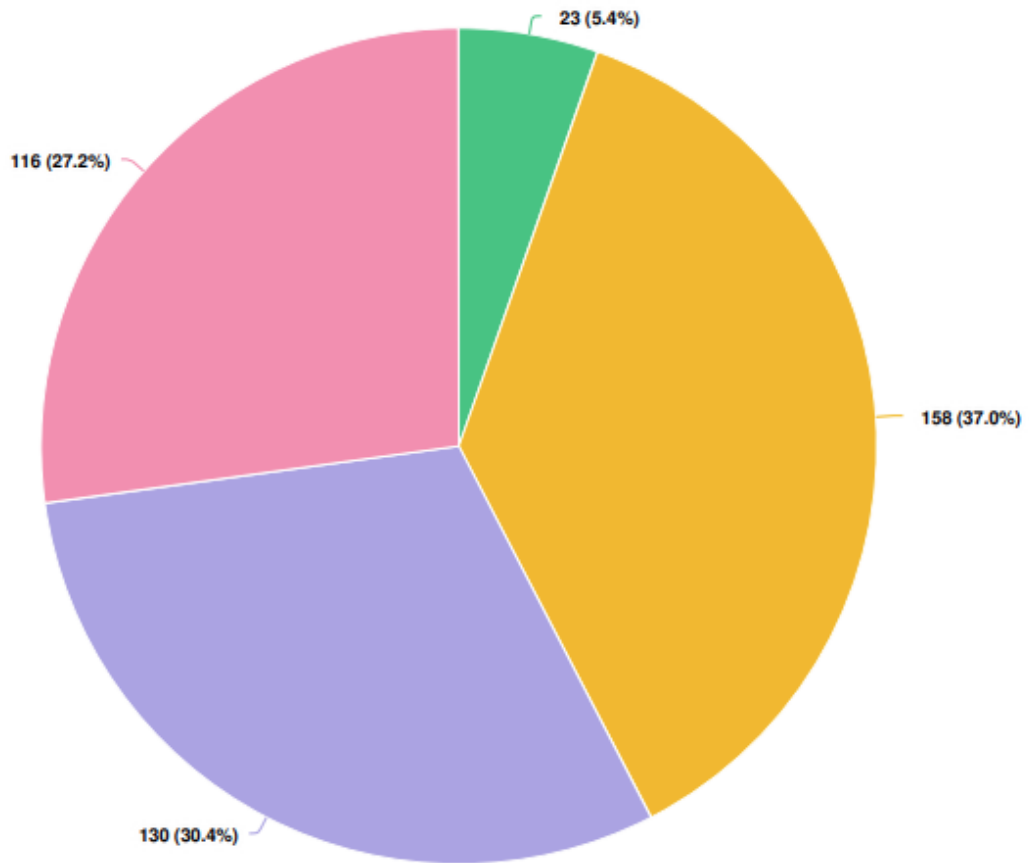
Q4 For each service listed below, rank the level of satisfaction. If you do not utilize the service, please select "N/A".



Q4 For each service listed below, rank the level of satisfaction. If you do not utilize the service, please select "N/A".

Purchasing or making a payment (e.g., rentals, recreation programs, invoices, tickets/fines, property taxes/bills, applications)

Q5 How often do you utilize the Town of Halton Hills' services?



Question options

- Annually
- Monthly
- Weekly
- Daily

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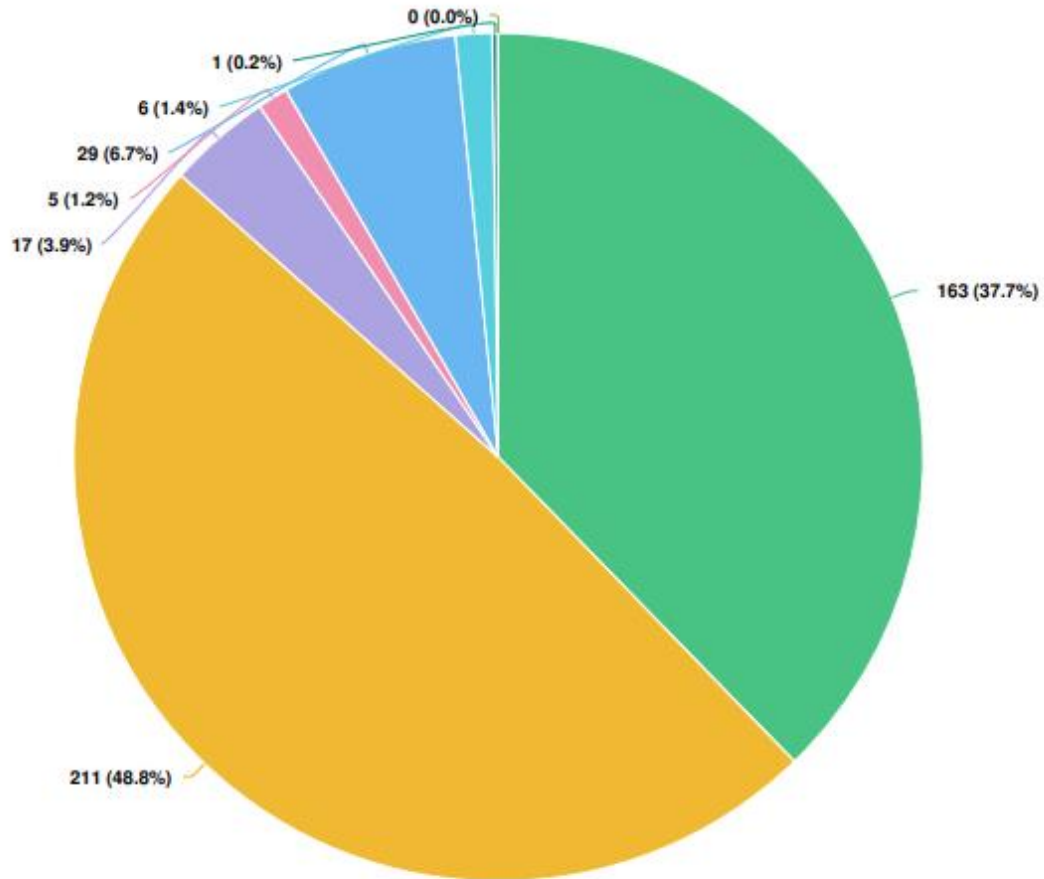
Q6 For each service listed below, rank the frequency you utilize it. If you do not utilize the service, please select "N/A".



Q6 For each service listed below, rank the frequency you utilize it. If you do not utilize the service, please select "N/A".

Purchasing or making a payment (e.g., rentals, recreation programs, invoices, tickets/fines, property taxes/bills, applications)

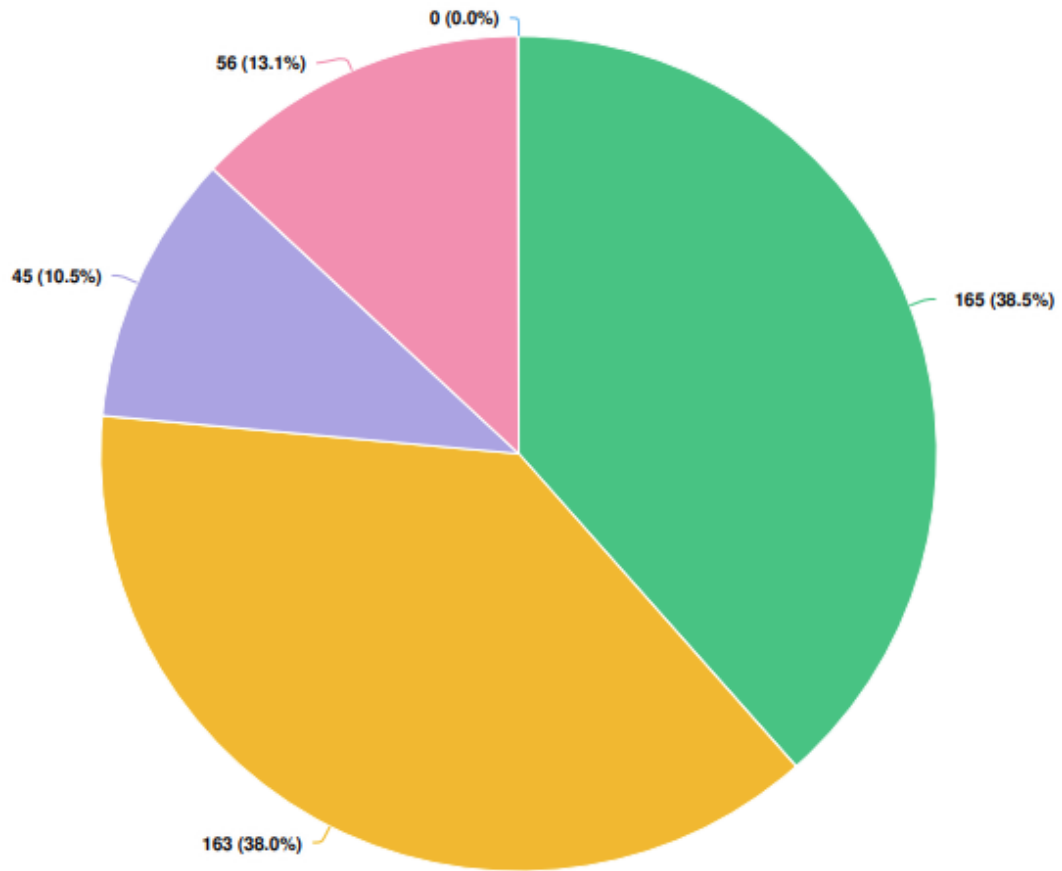
Q7 What is your preferred method of communication when contacting the Town?



Question options

- Mail / Fax
- Other (please specify)
- Text/direct message
- Website form
- Social media
- In-person
- E-mail
- Telephone

Q8 What is your preferred method of interaction when completing Town services, regardless of what is currently being offered?

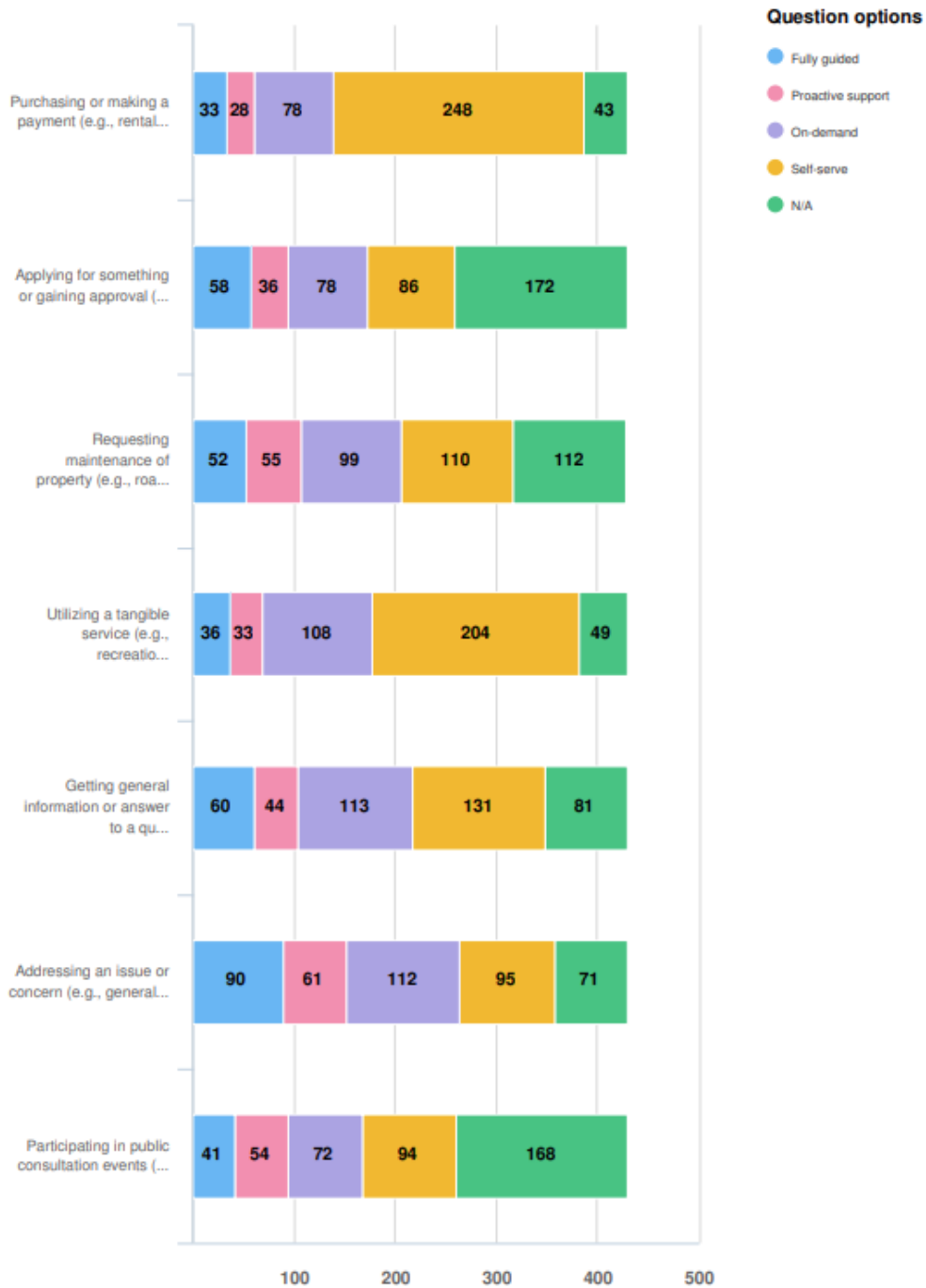


Question options

- Other (please specify)
- Fully guided (have a staff member to guide the process/service experience)
- Proactive support (receive help, updates, "check-ins" periodically and proactively)
- On-demand support (have access to resources/help when required)
- Self-serve (complete tasks independently)

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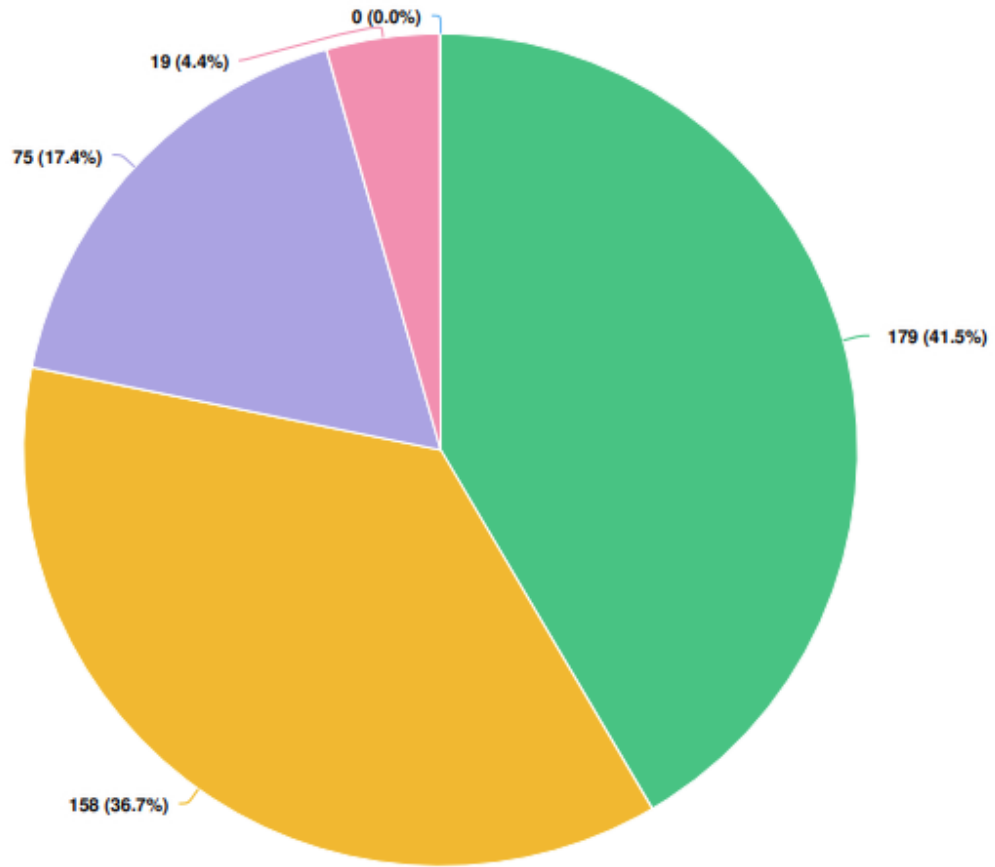
Q9 For each service listed below, what is your preferred method of interaction when completing Town services? If you do not utilize the service, please select "N/A".



Q9 For each service listed below, what is your preferred method of interaction when completing Town services? If you do not utilize the service, please select "N/A".

Purchasing or making a payment (e.g., rentals, recreation programs, invoices, tickets/fines, property taxes/bills, applications)

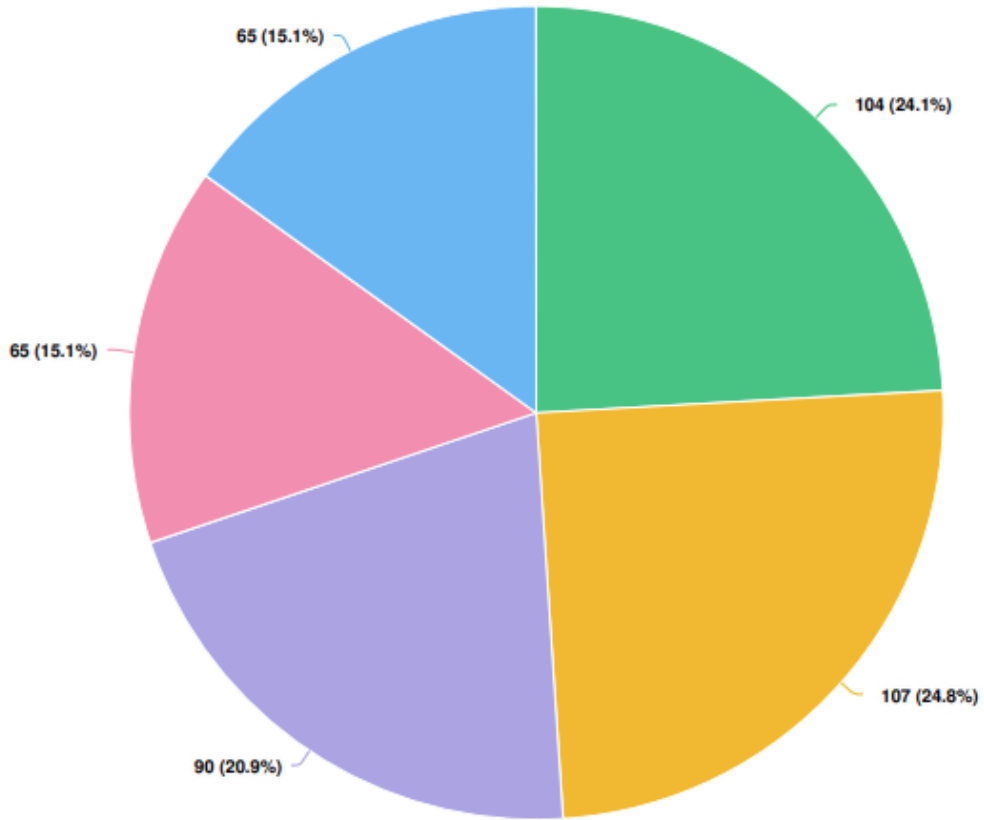
Q10 How important is it that you have a single service point-of-contact (dedicated service team) to complete general and frequent service interactions with the Town?



Question options

- Very unimportant
- Unimportant
- Neither important nor unimportant
- Important
- Very important

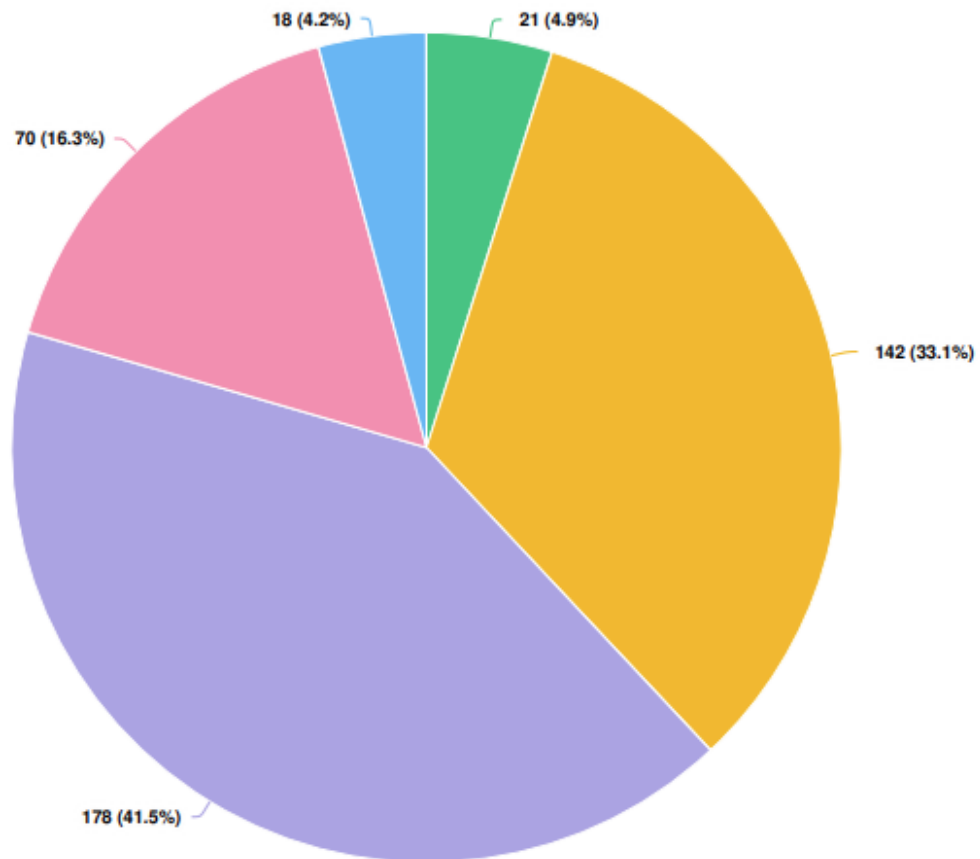
Q11 | How likely are you to utilize a digital tool (e.g., digital conferencing/communications) at home or at a Town facility to attend meetings and other interactions with the Town staff?



Question options

- Very unlikely
- Somewhat unlikely
- Somewhat likely
- Likely
- Very likely

Q12 Please rank the ease of use/navigation of the Town's website – haltonhills.ca (i.e., is it intuitive?)



Question options

Very difficult Difficult Neutral Easy Very easy

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Q13 On a scale of 1 (completely digital/self-service) to 5 (completely in-person/assisted), rate your preference for completing and interacting with the following services. If you do not utilize the service, please select "N/A".

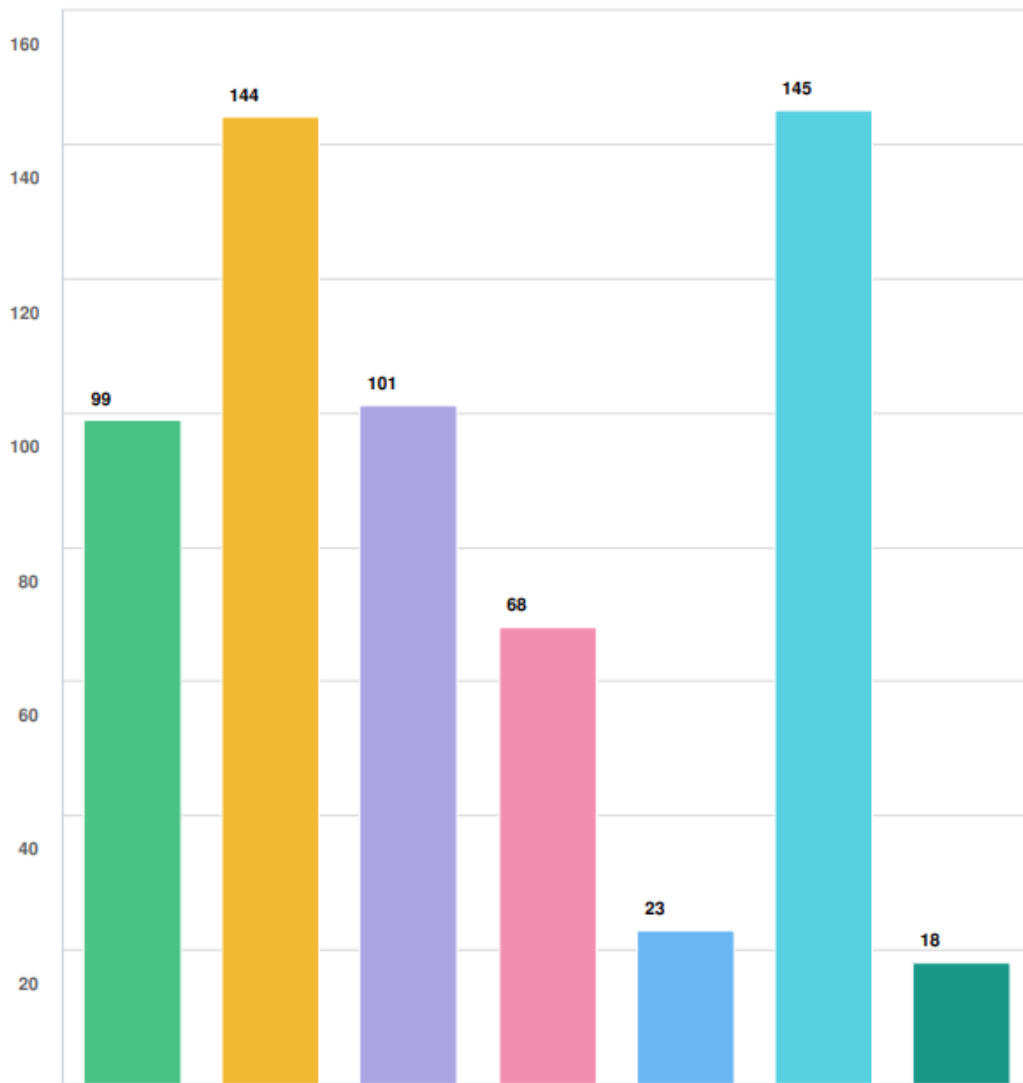


Q13 On a scale of 1 (completely digital/self-service) to 5 (completely in-person/assisted), rate your preference for completing and interacting with the following services. If you do not utilize the service, please select "N/A".

Purchasing or making a payment (e.g., rentals, recreation programs, invoices, tickets/fines, property taxes/bills, applications)

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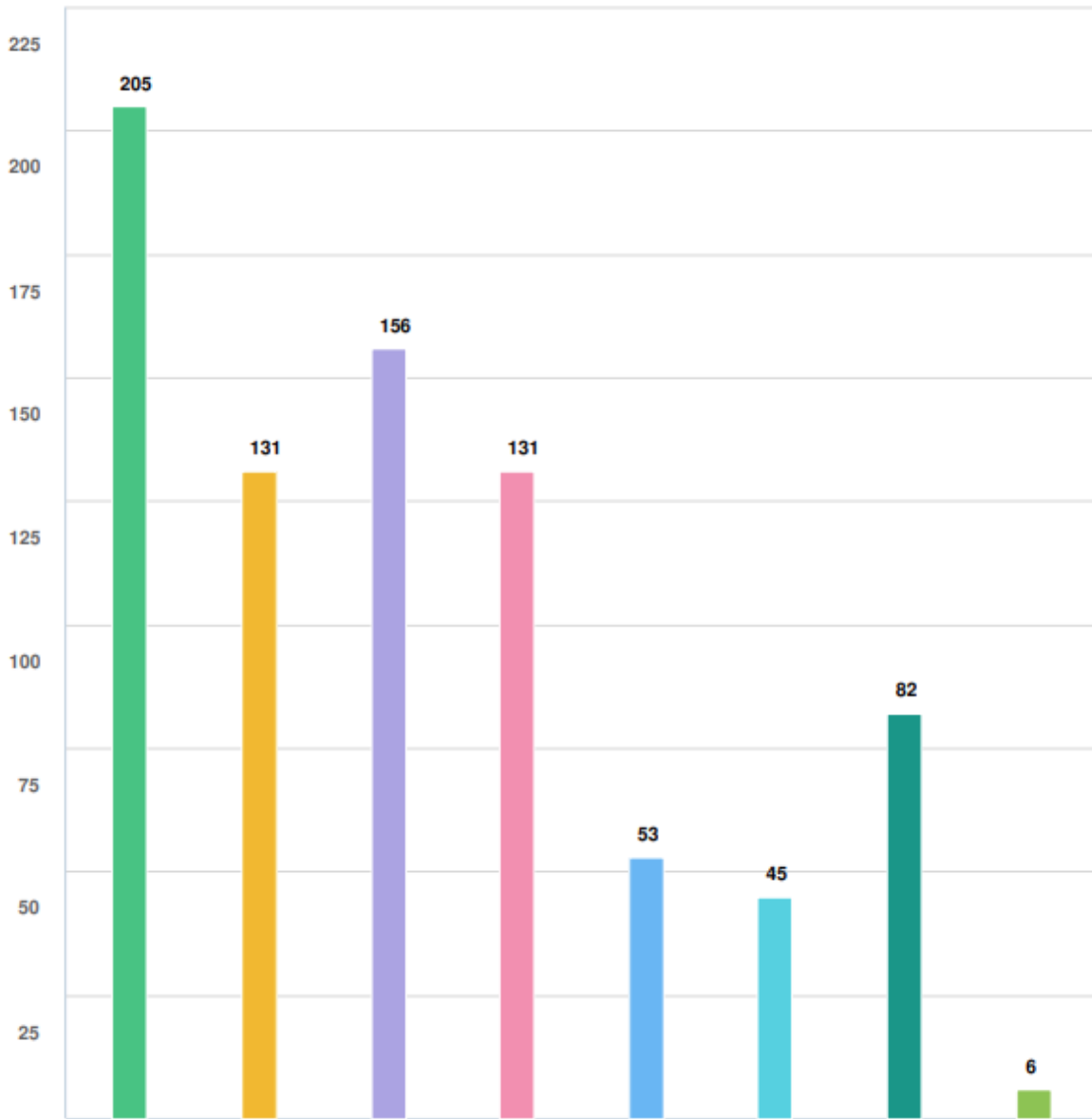
Q14 What are the two greatest challenges/issues when interacting with the Town? (Please select your top two choices).



Question options

- Other (please specify)
- I don't experience any challenges/issues
- Unfriendly or unhelpful attitude from staff members
- Unavailable or limited digital tools/platforms
- Long delays and/or no responses to inquiries
- Unclear and/or unavailable information
- Confusing and/or inconsistent processes

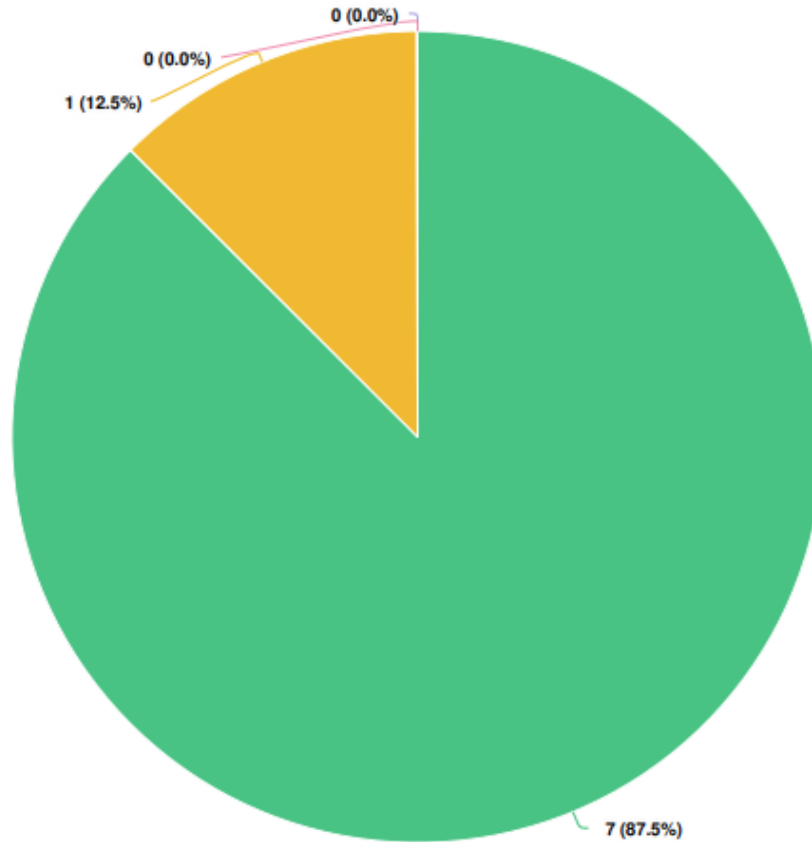
Q16 What are the two important aspects to you when interacting with Town services?
 (Please select your top two choices).



Question options

- Other (please specify) ● Resolving my issue at the first call/contact
- Technology-driven processes to do things on my own ● Getting things done as fast as possible
- Access to information is accurate and easy to understand ● Staff demonstrate accountability and follow-up with concerns
- Staff are courteous and professional ● It is simple and easy to access/use Town services

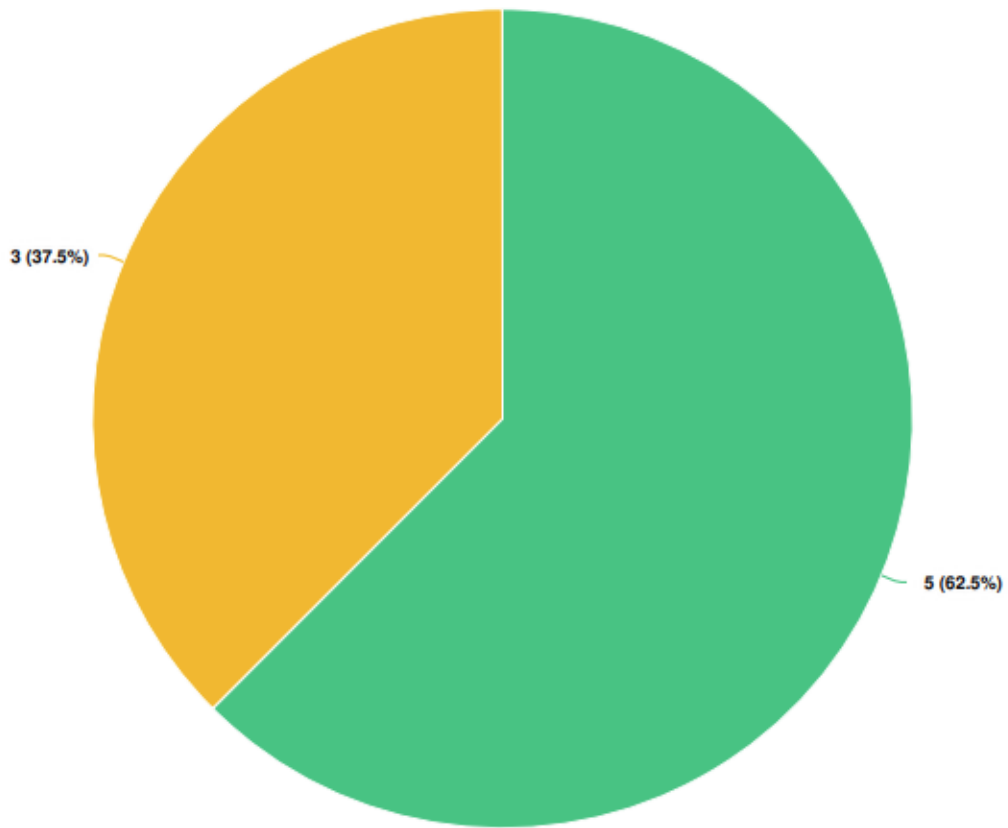
Q20 Please select the option that best describes yourself and/or your institution:



Question options

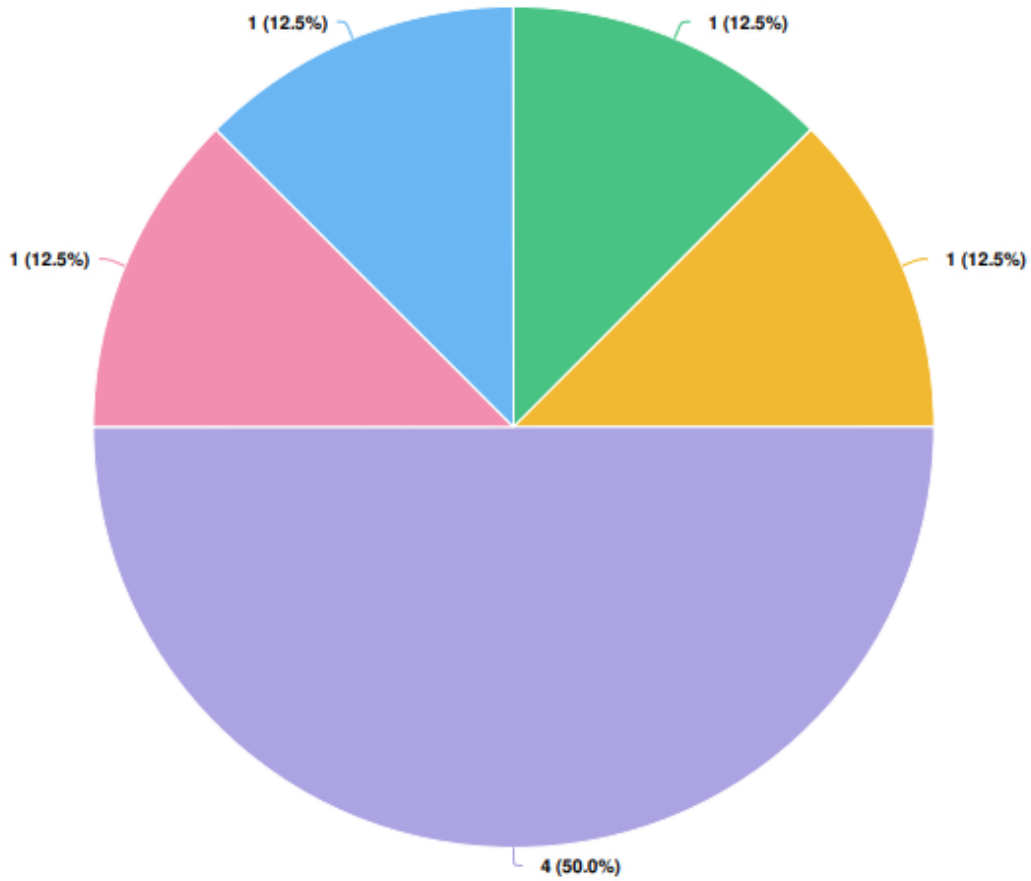
- Other (please specify)
- I am a part of an advocacy group
- I work for/own a development company
- I am a business owner

Q21 | Do you consider the Town to be business friendly?



Question options
● No ● Yes

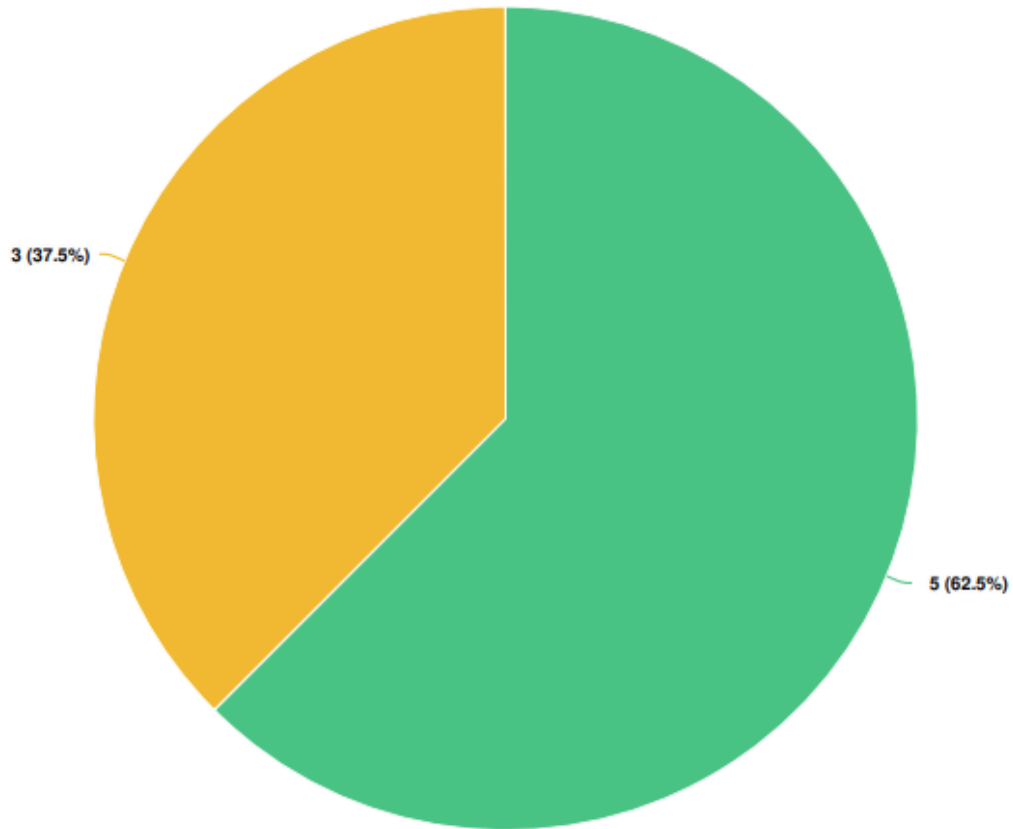
Q24 Please rate the following statement. My business/development organization has access to appropriate business resources and support from the Town.



Question options

- Disagree
- Somewhat disagree
- Neither agree nor disagree
- Somewhat agree
- Agree

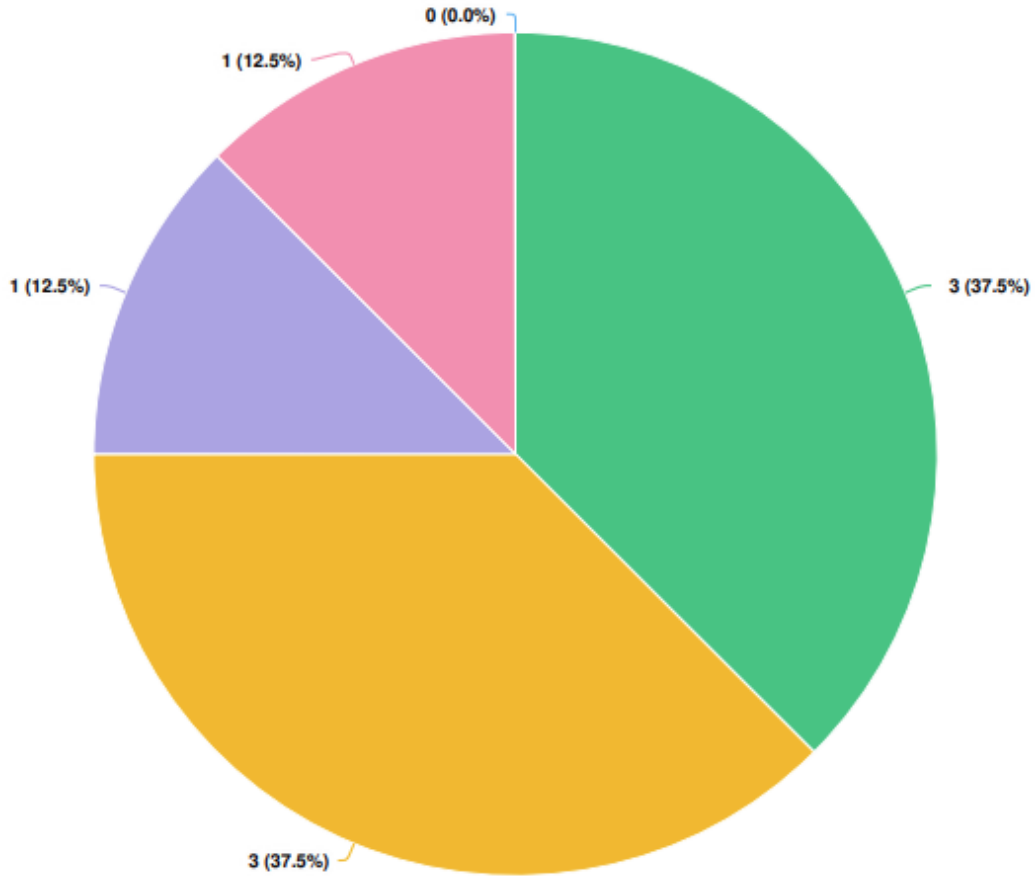
Q25 Are you kept up to date with new and changing information related to business or development initiatives?



Question options

● No ● Yes

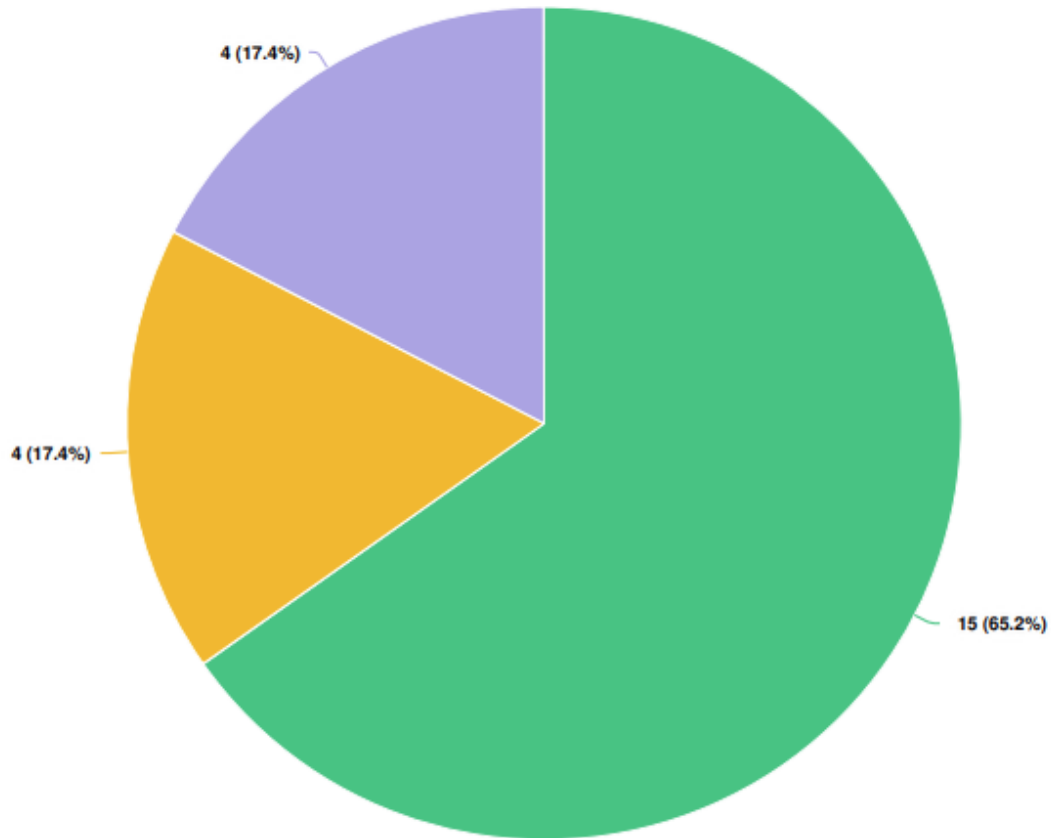
Q28 Please rate how engaged the Town has been with your business/development regarding planning, decision-making, and obtaining feedback.



Question options

- Totally engaged
- Totally unengaged
- Unengaged
- Neutral
- Engaged

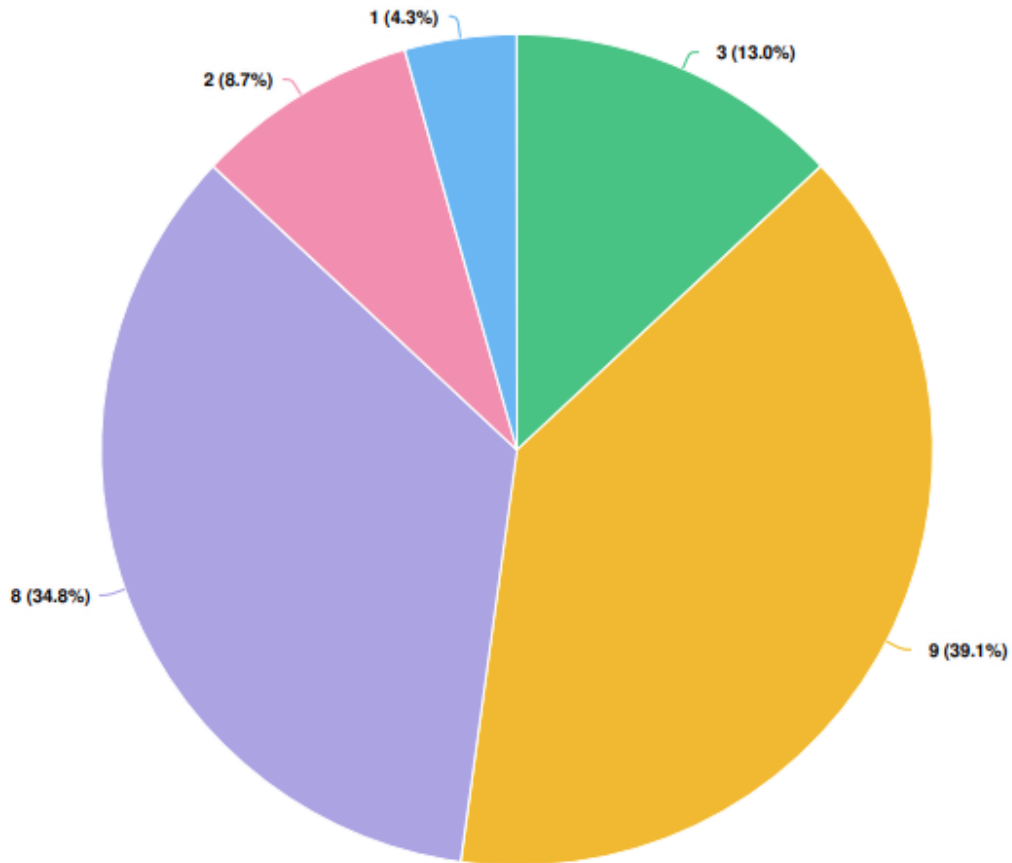
Q30 Do you feel that your feedback is captured, considered, and actioned by the Town to improve your relationship?



Question options

- Other (please specify)
- No
- Yes

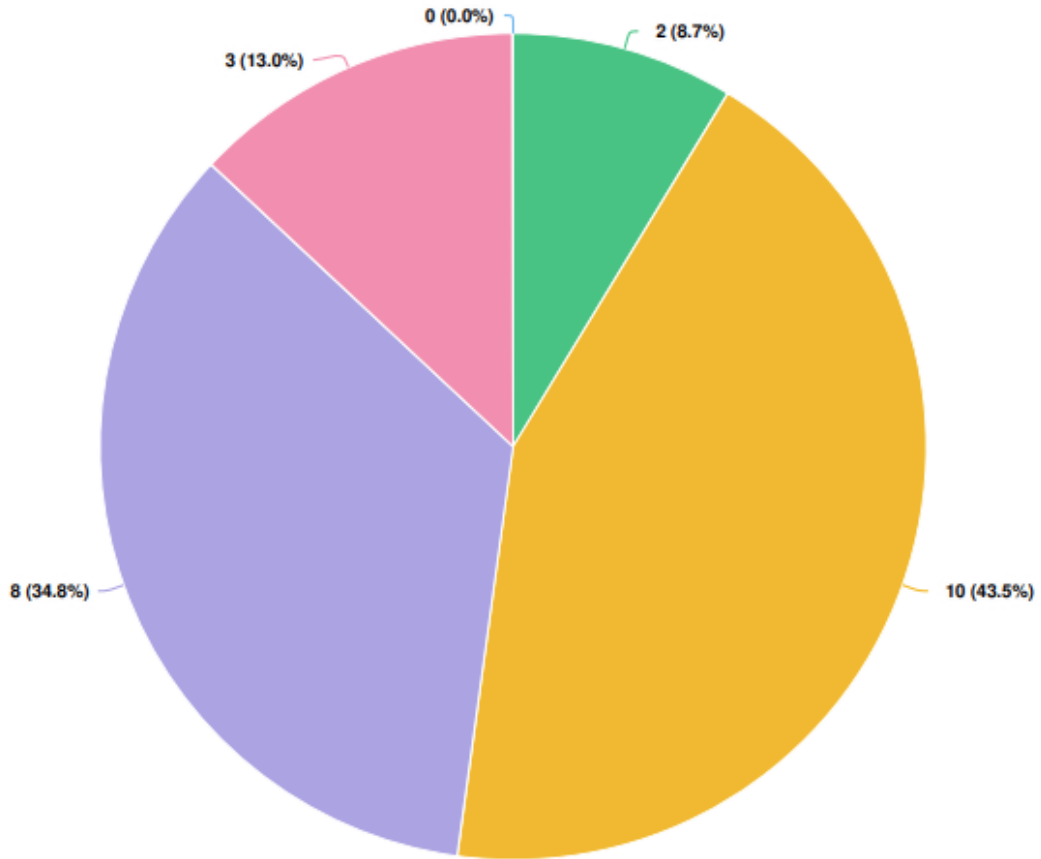
Q31 Please rank the following question. The services at Halton Hills provide the appropriate level of support and assistance for my association/group to be effective?



Question options

- Totally disagree
- Disagree
- Neither agree nor disagree
- Agree
- Totally agree

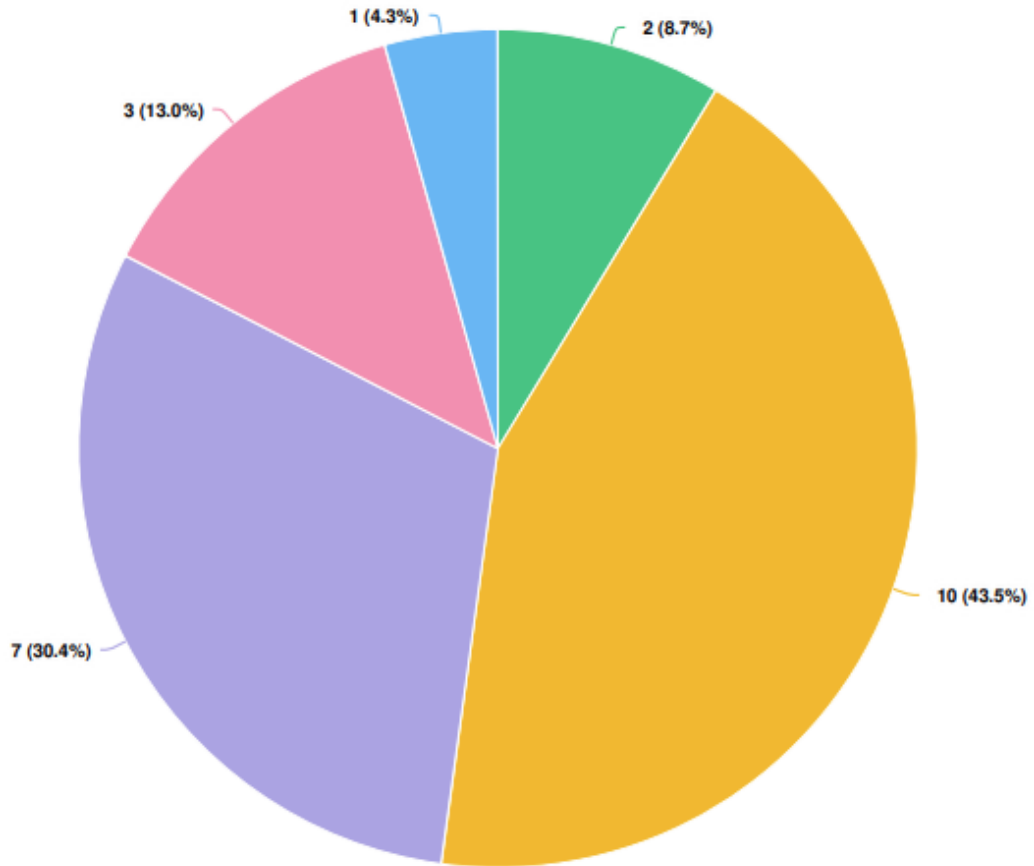
Q32 How effective is the Town in engaging with your association?



Question options

- Completely non-effective
- Non-effective
- Neutral
- effective
- Completely effective

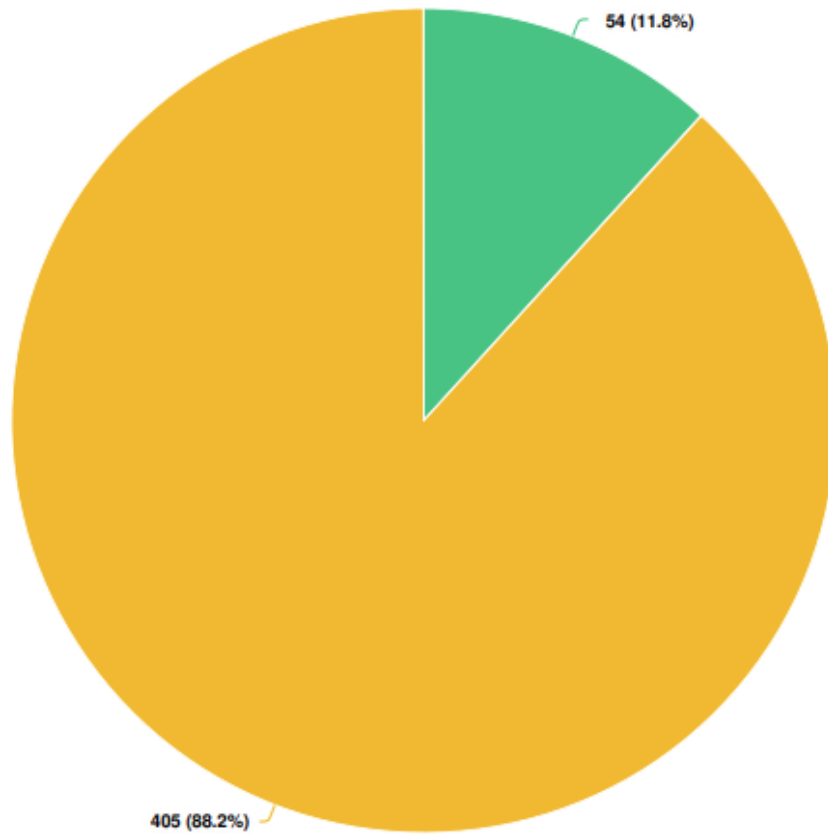
Q33 Please rate how engaged the Town has been with your organization/association regarding planning, decision-making, and obtaining feedback.



Question options

- Totally disengaged
- Disengaged
- Neutral
- Engaged
- Totally engaged

Q34 Would you like to be contacted to participate in the upcoming Customer Service Focus Groups held by the Town of Halton Hills and CSPN? (Note: We will select participants based on a representative sample and will contact you if you have been chosen ...



Question options

- No
- Yes

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Appendix IV: Service Inventory Matrix

OVERVIEW					
Dept	Business Unit	Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Office of the CAO					
Clerks					
		Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
		Manage Resolution of Customer Issues and Complaints	Service Delivery	Cross-Functional	Addressing an issue or complaint
		Manage Communications and Activities Processes between Elected Officials and Public	Service Delivery	Individual	Getting information or advice
		Manage End-to-End Investigation, Administration and Enforcement Process for Bylaw Related Issues	Service Delivery	Cross-Functional	Addressing an issue or complaint
		Own the End-to-End Execution of By-Law and Parking Enforcement Activities	Service Delivery	Cross-Functional	Addressing an issue or complaint
		Complete Administration Process for Specific Permits / Licenses / Registrations	Service Delivery	Individual	Obtaining approval or permission
		Manage Payment Process for Various Services / Enforcement Activities	Service Delivery	Individual	Purchasing or making a payment
		Own the Management and Execution of Activities for Service Halton Hills Desk*	Service Delivery	Cross-Functional	
*Service Halton Hills Desk (within Clerks)					
		Provide General Information and Support for Customer Inquiries Across Departments	Service Delivery	Individual	Getting information or advice
		Manage Resolution of General Customer Issues and Complaints Across Departments	Service Delivery	Individual	Addressing an issue or complaint
		Own the General Phonenumber and Email Inboxes for Halton Hills	Service Delivery	Individual	Getting information or advice
		Triage Incoming Community Connections to Appropriate Departments / Employees	Service Delivery	Cross-Functional	Getting information or advice
		Manage Application Process for Various Licenses and Permits to Community Members	Service Delivery	Cross-Functional	Obtaining approval or permission
		Manage Payment Process for Various Services	Service Delivery	Individual	Purchasing or making a payment
		Manage Process for Death Registry & Burial Documents	Service Delivery	Individual	Obtaining approval or permission
		Provide Commissioning Services for Documentation to Community & Internal Departments	Service Delivery	Individual	Requesting a service or action
		Process Invoices for Other Internal Departments that Don't Have Service Desks	Internal	Individual	N/A
Corporate Communications					
		Provide Information and Support for Customer Inquiries	Service Delivery	Cross-Functional	Getting information or advice
		Own the Development, Review and Deployment of Formal Internal / External Communications Content	Service Support	Cross-Functional	Getting information or advice
		Manage Website & Social Media Online Platforms	Service Support	Individual	Getting information or advice
		Support Departments with Internal / External Communications, Public Consultation Activities and Training	Service Support	Cross-Functional	N/A
		Manage Corporate Advertisement Partnership with Business Community	Service Delivery	Individual	Obtaining approval or permission
Strategic Initiatives					
		Lead the End-to-End Design, Planning, Management and Delivery of Organization-Wide Strategic Projects	Internal	Cross-Functional	N/A
		Support Departments with Designing, Planning and Executing Specific Strategic Initiatives	Internal	Cross-Functional	N/A
		Liase with Municipal Partners and External Stakeholders to Engage / Align on Approaches for Areas of Interest	Internal	Cross-Functional	N/A
Business, Environment & Culture					
		Provide Information and Support for Customer Inquiries (Public / Business Community)	Service Delivery	Individual	Getting information or advice
		Manage Sharepoint CRM for Business, Development, Stakeholder and Investment tracking	Service Support	Cross-Functional	
		Lead and manage the Community Improvement Plan programs	Internal	Individual	Getting information or advice
		Manage Economic Development and Tourism Websites, E-Letters and Social Media Online Platforms	Service Delivery	Individual	Getting information or advice
		Provide Internal / External Information and Advise on Diversity, Equity & Inclusion Within the Town	Service Support	Individual	Getting information or advice
		Manage and Execute of Halton Hills Tourism Program	Service Delivery	Individual	Getting information or advice
		Develop and Deliver Cultural Programing / Initiatives	Service Delivery	Individual	Utilizing a tangible service
		Manage Community Engagement / Volunteer Opportunities	Service Support	Individual	Utilizing a tangible service
		Lead the Organization-Wide Climate Change Program including Energy retrofit grants	Internal	Cross-Functional	N/A
		Lead the Organization-Wide Asset Management Program	Internal	Cross-Functional	N/A
Corporate Services					
Purchasing and Risk Management					
		Provide Information and Support for Customer Inquiries	Service Delivery	Cross-Functional	Getting information or advice
		Manage Insurance and Risk Management Program	Internal	Individual	N/A
		Manage Issuance and Procurement Process for Proposal Bids & Tenders	Service Delivery	Cross-Functional	Obtaining approval or permission
		Manage and Support Departments on Purchasing / Surplus Assets (not to be confused with surplus property)/Inventory Matters/Internal Courier	Service Support	Cross-Functional	N/A
Information Technology Services					
		Manage IT Help Desk Service	Internal	Individual	N/A
		Provide Internal IT Deployment and Support to Employees / Teams	Internal	Cross-Functional	N/A
		Manage Internal IT Infrastructure / Telephony and Data Gathering / Reporting	Service Support	Individual	N/A
Human Resources					
		Manage all Recruitment, Hiring and Onboarding of New Staff Hires	Internal	Cross-Functional	N/A
		Develop and Facilitate Training / Employee Engagement Activities	Internal	Cross-Functional	N/A
		Assist with Employee and Labour Relations Activities	Internal	Cross-Functional	N/A
Finance					
		Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
		Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
		Manage Billing, Payments / Collection and Administration of Property Taxes and Rebates / Deferrals	Service Delivery	Individual	Purchasing or making a payment
		Create Financial Statements and Annual Financial Public Documents	Internal	Cross-Functional	N/A
		Manage the Processing and Reconciliation of Invoices / Financial Ledgers	Internal	Individual	N/A
		Manage Non-Tax Related Vendor and Accounts Receivable Financials	Service Delivery	Individual	Purchasing or making a payment
		Support Departments on Finance-Related Planning, Charges, Grants and Applications	Internal	Cross-Functional	N/A
Transportation & Public Works					
Building Services					
		Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
		Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
		Manage the Review and Issuance Process for Specific Permits / Approvals	Service Delivery	Cross-Functional	Obtaining approval or permission
		Collaborate with Customers to Facilitate Inspections Related to Permitting	Service Delivery	Individual	Obtaining approval or permission
		Lead Enforcement of the Building Code Act	Service Delivery	Individual	Obtaining approval or permission
		Manage the Sewage System Maintenance Inspection Program	Internal	Individual	N/A
Public Works					
		Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
		Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
		Manage Payment Process for Various Services	Service Delivery	Individual	Purchasing or making a payment
		Manage End-to-End Execution of Requests for Maintenance- Services from Customers	Service Delivery	Individual	Requesting a service or action
		Own the Management and Execution of Maintenance for Town Assets (i.e. Fleet, Equipment, Facilities)	Service Support	Cross-Functional	N/A
		Own the Management and Execution of Various Seasonal Maintenance Activities (i.e., Grass Cutting, Snow Removal)	Service Support	Individual	N/A
		Manage the After Hours Call Service with Vendor and Triaging of Calls to Appropriate Departments	Service Support	Individual	Getting information or advice
Transportation					
		Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
		Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
		Manage & Facilitate the Delivery of ActiVan / Taxi Scrip Operations to Customers	Service Delivery	Sub-Contract	Utilizing a tangible service
		Manage Payment Process for ActiVan / Taxi Scrip Related Services	Service Delivery	Individual	Purchasing or making a payment
		Manage Maintenance Activities for Transportation Related Resources	Service Delivery	Cross-Functional	N/A
		Support Planning and Design of Traffic Operations and Flow	Service Support	Cross-Functional	N/A
		Manage Planning and Public Promotion / Education Regarding Transportation	Service Support	Individual	Getting information or advice
		Manage School Crossing-Guard Program	Service Delivery	Individual	Utilizing a tangible service
Engineering & Construction					
		Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
		Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
		Develop Public Communications Content on Plans, Studies and Upcoming Projects	Service Delivery	Cross-Functional	Getting information or advice
		Own the Planning, Design and Construction Process for Major Infrastructure Projects with Vendors	Service Support	Sub-Contract	N/A
		Own the Development of Engineering Research Studies	Internal	Individual	N/A
		Perform Surveying and Utility Locates	Internal	Individual	N/A
Development Engineering					
		Process and Manage Entrance / Excavation Permits	Service Delivery	Individual	Obtaining approval or permission
		Manage Site Alteration Permitting and Enforcement	Service Delivery	Individual	Obtaining approval or permission

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Recreation & Parks			
Parks & Open Space			
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Facilitate Consultation Sessions with Community and Volunteer Groups	Service Delivery	Individual	Participating in public consultations
Develop Content for Public Communications and Artefacts	Service Delivery	Cross-Functional	Getting information or advice
Manage the Acquisition, Planning, Design and Construction of Open-Space Capital Projects (new / Improvements)	Service Support	Cross-Functional	N/A
Manage the Review and Approval Process for Development Applications	Service Delivery	Individual	Obtaining approval or permission
Facilities			
Provide Information and Support for Customer Inquiries for Each Facility	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints for Each Facility	Service Delivery	Individual	Addressing an issue or complaint
Lead the Management and Day-to-Day Execution of Service-Operations in all Facilities (Individual Facility Level)	Service Delivery	Individual	Utilizing a tangible service
Manage the Design and Construction of Major Facility Capital Projects / Assets (new / Improvements)	Internal	Cross-Functional	N/A
Own the End-to-End Maintenance and Asset Management in all Municipal Facilities (at the Individual Facility Level)	Service Support	Individual	N/A
Develop New Programming / Interaction Opportunities for Customers	Internal	Cross-Functional	Utilizing a tangible service
Manage Memberships & Punch Passes	Service Delivery	Individual	Purchasing or making a payment
Manage Payment Process for Various Services	Service Delivery	Individual	Purchasing or making a payment
Complete Recreation Program Registration Process for Customers	Service Delivery	Individual	Obtaining approval or permission
Complete Facility and Open Space Booking / Renting for Customers	Service Delivery	Cross-Functional	Obtaining approval or permission
Community Development			
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Own Community Engagement Initiatives to Build Relationships, Collaboration and Partnerships	Service Delivery	Cross-Functional	Participating in public consultations
Support and Manage Customers in the End-to-End Special Events Process	Service Delivery	Cross-Functional	Getting information or advice
Coordinate with Departments to Organize Completion of Applications and Permits for Customer Events	Internal	Cross-Functional	Obtaining approval or permission
Own the End-to-End Development, Management and Delivery of Formal Town Events	Service Delivery	Cross-Functional	Utilizing a tangible service
Manage Volunteer Workforce and Scheduling of Parks / Schools	Service Delivery	Individual	Requesting a service or action
Manage Community Grant Program	Service Delivery	Individual	Obtaining approval or permission
Recreation Services			
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Complete Recreation Program Registration Process for Customers	Service Delivery	Individual	Obtaining approval or permission
Complete Facility and Open Space Booking / Renting for Customers	Service Delivery	Cross-Functional	Obtaining approval or permission
Complete Cemetery Related Sales and Services Activities	Service Delivery	Cross-Functional	Obtaining approval or permission
Manage Memberships & Punch Passes	Service Delivery	Individual	Purchasing or making a payment
Manage Payment Process for Various Services	Service Delivery	Individual	Purchasing or making a payment
Own the End-to-End Design, Management and Delivery of Community Partnerships / Programs	Service Delivery	Cross-Functional	Utilizing a tangible service
Oversee the Management and Day-to-Day Execution of Service-Operations for all Recreation Facilities	Service Delivery	Individual	Utilizing a tangible service
Own End-to-End Recreation Online Platforms, Marketing Materials and Communications	Service Delivery	Individual	Getting information or advice
Own the Relationship, Management and Execution of Recreation Services for Public Associations / Groups	Service Support	Individual	Participating in public consultations
Planning & Development Services			
Development Review & Committee of Adjustment			
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Manage End-to-End Administrative Function of Development Application Process (OPA/ZBA/Site Plan)	Service Delivery	Individual	Obtaining approval or permission
Manage End-to-End Administrative Function of Development Application Process (Committee of Adjustment)	Service Delivery	Individual	Obtaining approval or permission
Own the Management and Execution of Plan / Zoning Bylaw Amendment Process	Service Delivery	Individual	Obtaining approval or permission
Lead the Urban Design / Planning of Subdivisions and Condominiums	Internal	Individual	N/A
Coordinate with Halton Area Development Managers (HADM)	Internal	Cross-Functional	N/A
Policy, Heritage, and Information Services			
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	N/A
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	N/A
Support Development and Management of the Town Official Plan / all Secondary Plans	Internal	Individual	Participating in public consultations
Manage Updates to & Creation of Comprehensive Zoning Bylaw	Internal	Individual	
Perform Long-Term Planning Studies to Inform Policy / Heritage	Service Delivery	Individual	Getting information or advice
Perform GIS-Related Assessments and Analysis for Planning Purposes	Service Support	Cross-Functional	N/A
Facilitate Public Consultations to Gather Input and Feedback when Developing Plans	Service Delivery	Individual	N/A
Legal			
Provide Information and Support for Customer Inquiries	Service Delivery	Cross-Functional	Getting information or advice
Support and Advise Departments on Legal Subject Matter impacting Permits / Services Delivered to Customers	Service Support	Cross-Functional	N/A
Review and Respond to Compliance Requests	Service Support	Individual	N/A
Prepare Development & Non-Development Agreements / Documents (incl. Licenses and Leases)	Internal	N/A	N/A
Coordinate Registration of Subdivisions and Land Acquisitions / Dispositions	Internal	N/A	N/A
Emergency & Fire Services			
Public Education			
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Facilitate Safety-Related Educational Programs, Activities and Training to Public	Service Delivery	Individual	Utilizing a tangible service
Inspection and Enforcement			
Perform Fire-Safe Inspections for Permit / License Applications to Commercial and Residential Customers	Service Delivery	Cross-Functional	Obtaining approval or permission
Manage and Facilitate the 'Home Safe Home' Voluntary Inspection Program	Service Delivery	Individual	Utilizing a tangible service
Manage Fire & Safety Aspect of Business License Reviews	Service Delivery	Cross-Functional	Obtaining approval or permission
Complete Burn and Fireworks Permit Application Process	Service Delivery	Individual	Obtaining approval or permission
Emergency Management			
Own and Maintain the Town's Emergency Response Plan	Internal	Individual	N/A
Ensure Compliance with Emergency Management & Civil Protection Act	Internal	Individual	N/A
Emergency Response			
Provide Various Fire, Safety and Medical Emergency Services to Customers	Service Delivery	Individual	Utilizing a tangible service
Facilitation of the Superior Tanker Shuttle Accreditation	Service Delivery	Individual	Utilizing a tangible service

Appendix V: Comprehensive Recommendations List

#	Department	Business Unit	Challenge	Recommendation	Type	Strategy Alignment	Calculation Notes	Estimated Efficiency-Savings Range	Estimated Cost-Savings Range
1	Overall Organization		Wide range of abilities and approaches to using the IT systems and/or tools / templates throughout the Town causing lots of time / effort to follow up with employees, fix errors, etc.	Provide continuous training to appropriate employees on technical skills relating to the use and execution of service activities being completed.	Decrease Task Duplication	Employee Training	handle 101,880 customer inquiries (total calls) more efficiently reducing effort for 10% of calls by 30secs. per interaction	51 - 100	> \$5,000
2	Overall Organization		Lack of knowledge of role responsibilities across various departments and what can be completed within different teams causing lots of back and forth with teams and transferring to wrong employees.	Develop knowledge bank of updated roles / responsibilities for all staff that can be accessed and referenced easily within digital tools	Streamline Activities	Systems Transformation	handle 101,880 customer inquiries (total calls) more efficiently reducing effort for 10% of calls by 30secs. per interaction	51 - 100	> \$5,000
3	Overall Organization		Frontline staff spend significant time / effort trying to locate information and	Provide virtual consultation and sperate service desk options to customers to	Streamline Activities	Facility Design	Effort to be redistributed - not decreased		

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			figure out answers when supporting for answered that may be over complicated and not something that the specific employee should be required to complete.	reduce time spent by Service Halton Hills employees trying to find information and provide answers to more complicated inquiries / issues					
4	Overall Organization		The effective gathering, organizing and reporting on data is a challenge for individual departments. There is no Business Analytics type resource currently who can own these activities and complete in the most effective and efficient way.	Hire a Business Analyst role to be responsible for organizational data capture, organization, analysis and reporting. This will be increasingly important as the Town looks to increase its capture and measure service-related data/information.	Mitigate Future Cost	Employee Training	Mitigate future expenditures from ineffective understanding of customer information		
5	Overall Organization		Minimal customer information is being tracked to understand volume, details, and status of interactions with the Town across departments.	Leverage AMANDA system or procure a new system to increase functionality to perform Customer Relationship Management	Streamline Activities	CRM System	Mitigate future expenditures from ineffective understanding of customer information		

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				(CRM) type capabilities (tracking of customer interaction information).					
6	Overall Organization		Various point-of-sale vendors utilized across the organization causes challenges with integrating into Great Plains	Consolidate all Town Point-of-Sale (PoS) Systems to a single vendor to streamline financial administration activities	Streamline Activities	Systems Transformation	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews		
7	Overall Organization		Not all payments are able to be done online / self-serve (i.e., associations payments for facility bookings) causing increased volumes of customer contacts for employees to complete these tasks	Digitize all payment functions to be completed via online / self-serve tools.	Increase Self-Serve Volume	Online Services	reduce volume of 32,604 payments being completed by 50% (desired self-serve activity from survey data (2 min per interaction)	500+	\$10,000 - \$25,000
8	Overall Organization		Customer service standards, levels approaches, and quality can vary wildly depending on the individual departments /	Define service standards that are realistic and achievable. Incorporate these into performance measurements	Improve Service Experience	Service Standards	N/A		

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			teams causing inconstant service delivered and employee confusion for expectations.	for employees to be able to track and ensure they are being met. Create singular service standards, measures and training that can be deployed across all departments.					
9	Overall Organization		Customer service, standards, levels approaches, and quality can vary wildly depending on the individual departments / teams causing customer confusion for expectations.	Define service standards that are realistic and achievable. Promote these externally to the community to ensure there is alignment in expectations	Improve Service Experience	Service Standards	N/A		
10	Overall Organization		Balance of Customer Service activities and core job functions is difficult. Same staff that are not primarily responsible for frontline customer service are answering complaints and calls from various channels.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be	Streamline Activities	Service Centralization	handle 101,880 customer inquiries (total calls) more efficiently reducing effort for 20% of calls by 1min per interaction	201 - 500	\$5,000 - \$10,000

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				triaged for support.					
11	Overall Organization	Mitel Telephony System	Customers self-direct themselves to wrong departments because they don't know which they need to speak with to resolve their issue or they get tired of waiting in the automated IVR and select any number to be directed to a live person.	Modify IVR of telephony system to provide key services available to be completed (i.e., make a payment, obtain a permit, etc.). Remove the ability for direct contact into departments other than Service Halton Hills to reduce unnecessary call volumes across the organization.	Streamline Activities	Systems Transformation	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	101 - 200	\$5,000 - \$10,000
12	Overall Organization		Numerous online forms and service abilities are not integrated into their appropriate system (i.e., AMANDA, CityWorks, Xplor) and are therefore not being tracked and/or have to be entered manually by employees requiring time / effort.	Integrate online forms into existing systems to automatically capture and track the inquire and decrease the time / effort placed on employees to manually enter.	Streamline Activities	Systems Transformation	reduce effort to manually input 9043 forms (3mins per task)	201 - 500	\$10,000 - \$25,000
13	Overall Organization		Customer complaints / issues that	Define escalation process for who is involved and the	Decrease Task Duplication	Service Standards	based on analysis from relevant	51 - 100	\$10,000 - \$25,000

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			require escalation can end up involving numerous different employees and require increased time / effort.	activities to be completed so that only those that need to be involved are included.			existing data and anecdotal activity / effort descriptions during employee interviews		
14	Overall Organization		Customer inquiries / complaints come into the Town from numerous channels directly to various employees across all departments. This makes it very challenging for the Town to manage customer interactions and track information. Multiple employees will be involved in a customer inquiry when it may have been able to be completed by one person. Customers will also connect with the Town multiple times for the same issue	Centralize the customer service function at the Town and enhance the role of Service Halton Hills.	Decrease Task Duplication	Service Centralization	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	201 - 500	\$50,000+

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			which additional employees will spend time. effort completing the same need.						
15	Overall Organization	Website	Navigation of the website and information found within it will not always meet customer needs and therefore increase the volume of contacts into the town for customers to get the information they seek.	Update website with sections that have the most pressing information and high-volume interactions to reduce interaction volumes into the Town for simple requests.	Increase Self-Serve Volume	Online Services	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	201 - 500	\$25,000 - \$50,000
16	Overall Organization	Website	For some services / applications (i.e., road occupancy permit) Customers are required to find the appropriate form online, download the .PDF file, print out the .PDF file, fill out the form, scan the completed form, upload to their computer, and email back to the	Digitize all form submissions so they can be completed end-to-end online without having to jump to different service channels.	Increase Self-Serve Volume	Online Services	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	201 - 500	\$10,000 - \$25,000

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			Town (or submit hardcopy via mail / in-person / fax).						
17	Office of the CAO	Clerks	Website complaints are not automated to import directly into Customer inquiries into parking / tickets coming from website must be input manually into system to track requiring additional time / effort. Previous system being used had the ability to capture notes and input directly into system which enforcement officers could view. Current system does not have the functionality to capture notes for enforcement officers to reference and is being done manually in excel then sent individually to each officer.	Enhance system functionality to reduce the amount of manual intervention required from employees and increase the information sharing across roles.	Streamline Activities	Systems Transformation	reduce 10% of customer inquiries coming in from the 5450 parking related tickets processed (2min per interaction)	0 - 50	> \$5,000

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18	Office of the CAO	Clerks	No record management system to digitally store and efficiently access files (i.e., mayor letters)	Obtain a Document Management System to effectively store key Town records and formal collateral.	Streamline Activities	Systems Transformation - Updated Document Management System	Mitigate future expenditures from missing collateral or redeveloping documents not properly archived		
19	Office of the CAO	Clerks	The Service Halton Hills team needs a very wide knowledge base to address all customer service inquiries causing lots of time to try and look up the information or back and forth with customers to connect them to the right employee.	Identify a formal "Service Contact" within every department to act as the primary point of contact for centralized Service Halton Hills team to collaborate with when delivering services	Decrease Task Duplication	Service Centralization	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	101 - 200	\$10,000 - \$25,000
20	Office of the CAO	Communications	Multiple points of contact for inquiries and complaints	Centralize customer inquiries / complaints into a single entry-point - expand customer inquiry handling via social media channels to Service Halton Hills team.	Decrease Task Duplication	Service Centralization	reduce 5% of 101,880 customer inquiries (total calls) being sent to wrong employee (2min per interaction)	101 - 200	> \$5,000

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21	Office of the CAO	Communications	Can be a lengthy and cumbersome review / validation process for communications collateral submit by other departments	update policy to ensure there are clear requirements for what typed of communications content is required to be reviewed by the Communications team and expectations for turnaround times.	Decrease Task Duplication	Service Centralization	reduce effort of 500 requests for content review by 5mins per activity	0 - 50	> \$5,000
22	Office of the CAO	Communications	Major fluctuations in effort levels (month over month) and very tight turnaround times for content reviews from things submit by other departments	Update policy to ensure there are clear requirements for what typed of communications content is required to be reviewed by the Communications team and expectations for turnaround times.	Streamline Activities	Service Level Standards	reduce effort of 500 requests for content review by 5mins per activity	0 - 50	> \$5,000
23	Office of the CAO	Communications	Ticket-program for desired website changes is not being utilized by most employees.	Update policy to require use of this system and process when asking for website changes to decrease the strain on team employees.	Streamline Activities	Service Level Standards	reduce effort of 1000 requests for content review by 5mins per activity	51 - 100	> \$5,000
24	Office of the CAO	Communications	AODA reference tools and job aids not being utilized	Formalize AODA polices and reference tools.	Decrease Task Duplication	Systems Transformation - Updated	based on analysis from relevant	0 - 50	> \$5,000

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			by employees causing time / effort strain on Comms team	Include in update Document Management System.		Document Management System	existing data and anecdotal activity / effort descriptions during employee interviews		
25	Office of the CAO	Clerks (enforcement)	Misalignment with other departments on responsibilities for who owns the customer relationship for specific tasks and how to prioritize urgent matters / sense of urgency of tasks (i.e., inspections for Engineering).	Define team / employee role responsibilities to have distinct processes that each are required to complete and how the transfer of responsibility needs to take place.	Decrease Task Duplication	Employee Training	reduce effort for 1304 customer inquiries by 2min per interaction	0 - 50	> \$5,000
26	Office of the CAO	Clerks (enforcement)	inconsistency of which services can be tracked and managed though the AMANDA system. Wide range of what information is inputted into AMANDA.	Integrate additional permit / application processes into AMANDA (i.e., Business Renewal permits should be done in the same manner as Dog Licenses)	Streamline Activities	Systems Transformation	reduce effort for 1304 customer inquiries by 2min per interaction	0 - 50	> \$5,000
27	Office of the CAO	Clerks (enforcement)	Enforcement team can spend significant time / effort managing customer inquiries which is	Provide frontline Service Halton Hills employees with access to view updated information	Streamline Activities	Systems Transformation	reduce effort for 1304 customer inquiries by 2min per interaction	0 - 50	> \$5,000

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			a challenge due to hours being limited. Currently experiencing influx of complaints and cannot focus time / effort on proactively mitigating customer concerns.	about the status and details of enforcement complaints to streamline information sharing and responding to inquiries.					
28	Office of the CAO	Clerks	Current Team has high amounts of customer contacts across various channels. Many can be difficult to resolve quickly or may require analysis which is a challenge to complete while maintaining the volume of other incoming inquiries.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be triaged for support.	Decrease Task Duplication	Service Centralization	reduce number of 6760 customer inquiries into department by 10% (2min per interaction)	0 - 50	> \$5,000
29	Business, Environment & Culture		Difficulty with coordination between departments for the management and communications of stakeholder groups (i.e.,	Leverage AMANDA system or procure a new system to increase functionality to perform Customer Relationship	Decrease Task Duplication	CRM System	reduce time to complete 3,120 customer interactions from 30min to 25mins	201 - 500	\$5,000 - \$10,000

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			Business, Tourism, Volunteers, etc.) causing time / effort spent to track down status / information from other internal teams.	Management (CRM) type capabilities (tracking of customer interaction information).					
30	Business, Environment & Culture		Difficulty getting things reviewed / approved by cross-functional departments (with CIP) causing lots of time / effort spent on follow ups. Also causes delays to customers.	Digitize "approvals" processes to allow tracking of status and defining of deadlines to keep these activities moving forward during the desired turnaround time.	Streamline Activities	Systems Transformation	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	0 - 50	\$5,000 - \$10,000
31	Business, Environment & Culture		Employee time / effort spent collaborating with teams when supporting customers who do not know what rooms can be booked, amenities available, or where they are, and how to access - need better understanding of	Modify current IT Systems to ensure Business, Environment & Culture teams as well as Parks & Recreations teams have access to the same up-to-date information that can be relayed to customer when inquiring	Decrease Task Duplication	Systems Transformation	decrease 5% volume of 20384 customer contacts coming into department (from Recreation & Parks total volume)	51 - 100	\$10,000 - \$25,000

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			what resources are available						
32	Corporate Services	Purchasing & Risk Management	Standard practices are not being followed, such as templates / tools for tenders, quotes, and proposals or vendor performance reviews causing potential errors and duplication of work.	Obtain a Document Management System to effectively store updated templates / tools in one centralized area.	Streamline Activities	Systems Transformation - Updated Document Management System	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	0 - 50	> \$5,000
33	Corporate Services	Information Technology (IT) Services	individual systems implemented per department causing a lack of understanding to the alignment of each system into the overall technology infrastructure	Require consultation of IT team members in the discussions and planning of all potential IT purchasing	Mitigate Future Cost	Systems Transformation	Mitigate future expenditures from ineffective IT integrations		
34	Corporate Services	Finance	Various departments and employees are involved in processing financial / payment information causing inconsistencies in how it is reported, the	Centralize payment processing (i.e., reconciliation and organizing of reports / data files to be sent to Finance) to a single team to ensure consistency and efficiency in	Streamline Activities	Service Centralization	reduce 5mins of effort across the 3025 payments received per main service	201 - 500	\$5,000 - \$10,000

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			quality of information and how it sent to Finance. This is greatly increasing the amount of time / effort required by all involved.	completing. Collaborating can be limited between this team and Finance to action any issues.					
35	Corporate Services	Finance	Billing services for property taxes is a very paper-based and manual process. 22,000 bills will be sent out via mail, twice a year. Employees must complete the printing, sorting, stuffing, and postage placing a significant strain on capacity for other activities.	Outsource property tax billing process to third party	Mitigate Future Cost	Systems Transformation			
36	Corporate Services	Finance	Great Plains is not integrated to share information effectively with other payment / financial systems (i.e., AMANDA, Xplor, G-Techna). Lots of manual activities with employees often having to pull	Enhance integration functionalities between key systems to reduce time / effort required to manually reconcile financial information.	Decrease Task Duplication	Systems Transformation	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	500+	\$25,000 - \$50,000

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			data, put into excel in a more usable format, then send to the employee who requested the information.						
37	Corporate Services	Finance	Significant high volume of customer inquiries are for relatively simple property tax needs which takes a considerable amount of time effort form employees.	Continue with the planned design and deployment of a Customer Portal for Property Tax services (i.e., information, statements, key information) to decrease the volume of customer inquiries into the Town	Increase Self-Serve Volume	Online Services	reduce customer inquiries by %30 of potential based on 122132 tax payments received - assuming half will connect with the Town. (2min per interaction)	201 - 500	\$25,000 - \$50,000
38	Transportation & Public Works	Building Services	Process for issuance of permits includes paper-based files which requires significant resources to create, distribute and archive.	Digitize permitting process to allow for electronic document management and communications for employees	Streamline Activities	Systems Transformation	decrease volume of 867 permits submitted through paper-based methods by 20% (reduce effort to execute by 1 hr. per unit)	101 - 200	> \$5,000
39	Transportation & Public Works	Building Services	Process for completing permits includes paper-based and manual tasks that	Digitize permitting process to allow for customer self-serve capabilities	Increase Self-Serve Volume	Online Services	reduce effort of 867 permits submitted through	500+	\$25,000 - \$50,000

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			are then taken on by employees to execute. These same paper and manual channels require significant resources to create, distribute and archive.	when completing applications and submitting documents Note: Single system between Building Services and Development Review teams is required to ensure there is streamlined workflows.			paper-based methods by 2.5 hrs per unit		
40	Transportation & Public Works	Engineering & Construction	Difficulty responding to 'one-off' customer phone calls / inquiries without any previous knowledge of the issue causing time / effort to learn about the need, research it and try to provide an answer (all starting from scratch).	Leverage AMANDA system or procure a new system to increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).	Streamline Activities	Systems Transformation	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	0 - 50	> \$5,000
41	Transportation & Public Works	Engineering & Construction	No dedicated GIS resource to pull reports. This is a legislative requirement and needs to be maintained.	Cross-train team employees so more capacity can be devoted to these activities or hire dedicated GIS resource	Improve Service Experience	Employee Training	N/A		

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42	Transportation & Public Works	Engineering & Construction	Legislation on utility locates changed causing an increase in workload to physically be on site and complete this service.	Cross-train team employees so more capacity can be devoted to these activities or update job descriptions, so it is a part of more team members role.	Improve Service Experience	Employee Training	N/A		
43	Transportation & Public Works	Building Services	Balance of Customer Service activities and core job functions is difficult. Same staff working on permits / applications are answering complaints and call from various channels.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be triaged for support.	Streamline Activities	Service Centralization	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	201 - 500	\$10,000 - \$25,000
44	Transportation & Public Works	Development & Engineering	Balance of Customer Service activities and core job functions is difficult. Same staff working on detailed plans are answering complaints and	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be	Streamline Activities	Service Centralization	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	51 - 100	\$5,000 - \$10,000

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			call from various channels.	completed at first point of contact and which are required to be triaged for support.					
45	Transportation & Public Works	Public Works	Difficulty tracking customer inquiries resulting in missed follow-ups and increased time / effort in tracking down information or status to relay to customers.	Leverage existing system or procure a new system to increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).	Decrease Task Duplication	CRM System	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	201 - 500	\$25,000 - \$50,000
46	Transportation & Public Works	Public Works	After hours customer inquiries and contacts through this channel (third party vendor) is not integrated into AMANDA.	Integrate third party information captured from After Hours service into AMANDA / CRM system.	Streamline Activities	CRM System	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	51 - 100	> \$5,000
47	Transportation & Public Works	Public Works	Managing customer reports and requests coming through social media is difficult because	Prior to deploying centralized service model and technology infrastructure, savings can be	Decrease Task Duplication	Systems Transformation	based on analysis from relevant existing data and anecdotal activity /	101 - 200	\$5,000 - \$10,000

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			the channel is not integrated into current systems (i.e., AMANDA, CityWorks).	achieved in the short-term by integrate social media channels into Public Works workflow management systems. This will remove work effort from Communications team members and allow for the department and employees to be responsible for managing this channel. This can also reduce the number of employees that are responsible or actioning the social media inquiry before getting to public works.			effort descriptions during employee interviews		
48	Transportation & Public Works	Transportation	No Point-of-Sale (PoS) system to run tickets or sales through when completing transactions.	Leverage existing Xplor system functionality and capacity to consolidate all Town Payments / Point-of-Sale (PoS) Systems to a single vendor to streamline financial	Improve Service Experience	Systems Transformation	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	500+	\$25,000 - \$50,000

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				reporting and administration activities.					
49	Transportation & Public Works	Public Works	Public Works building not open for in-person services that some residents use (recycle bins, ActiVan tickets, garbage tags)	Allow for services being done at Public Works building to be competed at Town Hall so that the building can remain closed moving forward. This will also decrease the number of customer entry points and promote centralization.	Mitigate Future Cost	Facility Design	N/A		
50	Transportation & Public Works	Public Works	Public Works building not open for in-person services that some residents use (recycle bins, ActiVan tickets, garbage tags)	Enhance online services for recycle bins so they can be purchased and shipped to customer s directly without interaction from Town employees	Increase Self-Serve Volume	Online Services	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	51 - 100	\$5,000 - \$10,000
51	Transportation & Public Works	Transportation	Senior's request receipts; manual process to pull receipts and photocopy for customer requesting details	Digitize and automate receipt generation process for customers utilizing Taxi / ActiVan services. Can also be made	Streamline Activities	Systems Transformation	based on analysis from relevant existing data and anecdotal activity / effort descriptions	101 - 200	\$5,000 - \$10,000

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			of Taxi / ActiVan purchases.	available online to decrease Town employee's effort for this task.			during employee interviews		
52	Recreation & Parks	Recreation	Employee time / effort spent supporting customers because they do not know what rooms can be booked / amenities / where they are and how to access - need better understanding of what resources are available	Enhance website functionality and ease of access to allow for up-to-date information on all available facilities, rooms, and other services. Provide detail for status of availability and ability to complete end-to-end need (i.e., research, book, pay, and confirm). This is an identified improvement and is planned for 2023.	Increase Self-Serve Volume	Online Services			
53	Recreation & Parks	Community Development	Lack of consistent approach and process for on document storage / governance.	Obtain a Document Management System to effectively store key Town records and formal collateral	Streamline Activities	Systems Transformation	Mitigate future expenditures from missing collateral or redeveloping documents not properly archived		
54	Recreation & Parks	Parks & Open Space	Receive many inquiries that are not able to be completed by	Centralize customer inquiries / complaints into a	Streamline Activities	Service Centralization	Reduce volume of 2560 customer	0 - 50	> \$5,000

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			current team due to outdated information and phone numbers still available community members (i.e., department does not do any operations type tasks anymore).	single-entry point. Review external platforms and communications systems (i.e., website) to update / remove specific "contact information" available to the public.			inquiries by 10% (2min per interaction)		
55	Recreation & Parks	Recreation	Responsibilities for management of marketing activities and social media channels is difficult to keep up with due to limited resources.	Modify role responsibilities between Communications and Receptions teams to maximize synergies in similar tasks being completed. Minimizing the need for multiple review cycles for department then Communications team can decrease effort requirements. Leveraging existing Marketing / tracking type tools (i.e., Hootsuite) for recreation to be responsible for	Decrease Task Duplication	Service Centralization			

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				can remove steps in engaging with recreation customers.					
56	Recreation & Parks	Recreation	Customer service standards, levels approaches, and quality can vary wildly depending on the individual recreation facility causing inconstant service delivered and employee confusion for expectations.	Define service standards that are realistic and achievable. Incorporate these into performance measurements for employees to be able to track and ensure they are being met. Create singular service standards, measures and training that can be deployed across all facilities	Improve Service Experience	Service Standards	N/A		
57	Recreation & Parks	Recreation	Paper brochure for Parks & Recreation requires a significant amount of time / effort to complete and resources for the copy and management of printing.	Although the paper version of the brochure has not been offered for the past few years, it is recommended to continue to digitize annual brochure so it can be more easily socialized and delivered to customers at less cost (printing can be made available	Mitigate Future Cost	Online Services	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews		\$10,000 - \$25,000

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				if requested by customers)					
58	Recreation & Parks	Community Development	Special Events support for customers can require transfers when collaborating across different departments for the various permits needed causing increased time and effort to follow up and when "picking up" new applications. This also means a disjointed and confusing process for the customer who will call in more frequently to address questions.	Leverage AMANDA system or procure a new system to increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).	Decrease Task Duplication	CRM System	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	101 - 200	\$5,000 - \$10,000
59	Planning & Development	Development Review & Committee of Adjustment	Process for issuance of permits includes paper-based files which requires significant resources to create, distribute and archive.	Digitize permitting process to allow for electronic document management and communications for employees	Streamline Activities	Systems Transformation	decrease volume of 124 permits submitted through paper-based methods by 20% (reduce effort to execute by 1 hr. per unit)	0 - 50	> \$5,000

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60	Planning & Development	Development Review & Committee of Adjustment	Process for completing permits includes paper-based and manual tasks that are then taken on by employees to execute align same paper and manual channels which requires significant resources to create, distribute and archive.	Digitize permitting process to allow for customer self-serve capabilities when completing applications and submitting documents Note: Single system between Building Services and Development Review teams is required to ensure there is streamlined workflows.	Increase Self-Serve Volume	Online Services	reduce effort of 124 permits submitted through paper-based methods by 2.5 hrs. per unit	201 - 500	\$5,000 - \$10,000
61	Planning & Development	Policy, Heritage & Information Services	Resident disputes over developments within Town can be difficult to manage due to volume and completing on top of other core job functions.	Share customer inquiry / complaint activities with centralized customer service function to reduce the volume of incoming contacts to the department.	Streamline Activities	Service Centralization	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	0 - 50	\$5,000 - \$10,000
62	Planning & Development	Policy, Heritage & Information Services	Differing / competing expectations from developers and the public stakeholders' groups on what involvement each	Develop clear guidelines and policies that outline the engagement hat stakeholders' groups will have in the	Improve Service Experience	Service Standards	N/A		

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			should have in the planning consultation process	consultation process. Allow for feedback and input from stakeholders to ensure they are included in this process.					
63	Planning & Development	Development Review & Committee of Adjustment	Lack of standardization / clear processes resulting in multiple submissions and submissions not following guidelines which increases employee effort to review and follow up with customers to fix their errors	Digitize the application process to allow for more efficient review tracking and communications to customers. Can also provide training sessions / tools for customers on the process.	Streamline Activities	Systems Transformation	reduce effort of 124 permits submitted through paper-based methods by 2.5 hrs per unit	201 - 500	\$5,000 - \$10,000
64	Planning & Development	Development Review & Committee of Adjustment	Balance of Customer Service activities and core job functions is difficult. Same staff working on permits / applications are answering complaints and call from various channels.	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be	Streamline Activities	Service Centralization	Reduce volume of 1040 customer inquiries by 20% (5mins per interaction)	51 - 100	> \$5,000

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				triaged for support.					
65	Emergency & Fire Services		Providing fire / safety permit services to customers can take a significant amount of time / effort as there are often spikes in volumes during peak times.	Allow for fire / safety permits to be obtained at Town Hall and through online services. Promote the use of this to decrease customer inquiry volumes into the department.	Streamline Activities	Online Services	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	0 - 50	> \$5,000
66	Emergency & Fire Services		Collaborating with departments to support fire / safety aspects of permits can be difficult as it is difficult to know what tasks are needed to be done and when.	Integration and increase in accessibility of planned new Emergency Response System and AMANDA System can support this increase in transparency and decrease amount of effort spent while collaborating with departments to complete the services.	Streamline Activities	Systems Transformation	based on analysis from relevant existing data and anecdotal activity / effort descriptions during employee interviews	0 - 50	> \$5,000

Appendix VI: Service Infrastructure & Operational Details

Service by Facility

Facility	Service-Delivery	Virtual Meeting Space	Amenities	Hours	Service Details
Recreation Centres					
Action Youth Centre - Georgetown	CS Desk - Volunteer Run		lounge space, computers & wi-fi, kitchen *cooking activities, community meeting rooms, gymnasium	M-F: 3PM - 7:30PM	facilitate youth programs & events, handle general inquiries from the public regarding the centre and its programs, *"Both youth centres are attended by trained Town of Halton Hills staff"
Action Youth Centre - Acton	CS Desk - Volunteer Run		lounge space, computers & wifi, family style kitchen, community meeting rooms, shower and laundry amenities, accessible bathrooms, outdoor space	M-F: 3PM - 7:30PM	facilitate youth programs & events, handle general inquiries from the public regarding the centre and its programs, *"Both youth

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					centres are attended by trained Town of Halton Hills staff"
Hillsview Active Living Centre - Georgetown	CS Desk - Volunteer Run	may be difficult to facilitate virtual meetings in the space	hall, meeting rooms and lounge, full kitchen, air conditioning, wi-fi, parking, washrooms, audio/visual equipment, lending library	M-F 9AM - 4PM, Monday & Tuesdays open till 9PM - Hours are based on programming*	facilitate the purchasing of a centre membership, provide ActiVan and SPLIT passes, provide information and support on the Taxi script program, manage email & FB chat inquiries,
Hillsview Active Living Centre - Acton	CS Desk - Volunteer Run	may be difficult to facilitate virtual meetings in the space	full kitchen, air conditioning, wi-fi, parking, washrooms, audio/visual equipment, lending library	M-F 9AM - 4PM, 1st & 4th Wed open till 9PM - Hours are based on programming*	facilitate the purchasing of a centre membership, provide ActiVan and SPLIT passes, provide information and support on the Taxi script program, meeting rooms, event space.

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Cultural Centre - Helson Gallery	CS Desk	potential for space to be used for virtual meetings. (Acton Heritage Home)	performing arts theatre, art gallery, public library, studio room, kitchenette,	M-F 7AM - 11PM - Hours are based on programming* OR W-SU 1PM - 5PM	facilitate the purchasing of a centre membership, provide ActiVan and SPLIT passes, provide information and support on the Taxi script program, meeting rooms, event space.
Gellert Community Centre	CS Desk	potential for space to be used for virtual meetings.	Indoor: pool, sauna, hot-tub, multi-use room, Kinsmen Hall, play pool, boardroom, atrium, kitchen, washrooms, warming centre, cooling centre - Outdoor: walking trails, tennis, sports fields, skatepark, splashpad, playground, ball diamonds, outdoor washrooms	M 7:15AM - 9:30PM, T-F 6:30AM - 10PM, SAT 6AM - 7PM, SUN 7AM - 5PM	respond to general inquires, room booking, program registration and payment, process facility request forms - online 'Facility Request Form'
Acton Arena and Community Centre	CS Desk	potential for space to be used for virtual meetings.	2 community halls, 2 full size pads, children's leisure pad, centre meeting rooms, multi-purpose room, kitchen, cooling centre, warming	M-SU 6:30AM - 11:30PM	respond to general inquiries, room booking, program registration and payment,

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			centre, washrooms, amenities (playground, sports field, skatepark, outdoor washrooms, trail access)		process facility request forms - online 'Facility Request Form'
Acton Lion's Indoor Pool	No Dedicated CS	may be difficult to facilitate virtual meetings in the space	pool, sauna, showers,	5AM - 11PM, Hours based on programming	Respond to general inquiries, facilitate swimming lesson registration and payment, process facility request forms
Georgetown Indoor Pool	No Dedicated CS	may be difficult to facilitate virtual meetings in the space	pool	5AM - 11PM, Hours based on programming *not open for drop in swimming *	Respond to general inquiries, facilitate swimming lesson/lifesaving programs/aqua fitness registration and payment, process facility request forms
Mold Masters Sports Plex	CS Desk	potential for space to be used for virtual meetings. newly constructed addition underutilized. Customers use old entrance and often stay in older area. Service desks are much more equipped to deliver service in new addition	arena, halls, meeting rooms, outdoor skatepark (I.e., 4 ice pads, 1 large hall, 2 meeting rooms,)	M-SU 6:30AM - 11:30PM, Hours based on	Respond to general inquiries, facilitate swimming lesson

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				program ming	registration and payment, process facility request forms
Town Hall / Administrative Centres					
Robert C Austin Operations Centre	No Dedicated CS (closed to public)	Large boardroom - somewhat utilized for internal meetings. With building closed to public, could be a potential for opening just for virtual meetings.	Halton Hills Public Works Building	M-F 8:30AM - 4:30PM	provide recycling and green bins to public,
Town Hall	CS Desk - SHH	<p>Main Boardroom - very utilized internally and is setup for virtual. May be difficult to coordinate internal and customer related meetings Council Chambers - not being utilized often and is set up for virtual. Potential option for facilitating virtual meetings.</p> <p>Corporate services desk is permanently closed. do not see value in reopening. has large meeting room and is setup for virtual. Potential option for facilitating virtual meetings.</p> <p>Average 10-15 in-person customer interactions per day for Infrastructure / planning areas has small meeting room that could be utilized for virtual meetings.</p> <p>Town Hall service desks (excluding SHH). pre covid numbers</p>	Halton Hills Municipal Office	M-F 8:30AM - 4:30PM	houses the Service Halton Hills customer service area,

Appendix VII: Quantitative Analysis Data

Department	Unit	Service	Average Volume of Service (by Year)	Average Effort to Complete (hrs)	Source
Business, Environment & Culture		Resolving Customer Inquiries & Complaints	3,120	0.5	
Corporate Services	Finance	Completing Purchase Orders (PO)	207		
Corporate Services	Finance	Number of Tax Payments Received	122,132		2021 - new system tracking
Corporate Services	Finance	Processing Invoices	327		average of 2018 - 2021
Emergency & Fire		Resolving Customer Inquiries & Complaints	750		
Office of the CAO	Service Halton Hills	Completing Payments for Various Services	7,800	0.05	
Office of the CAO	Service Halton Hills	Managing Various Applications & Permits	1,040	0.08	
Office of the CAO	Clerks	Completing Payments for Various Services	260		
Office of the CAO	Clerks	Completing Various Permits / Licenses / Applications	520		
Office of the CAO	Clerks	Completing Death Registry & Burial Documents	364		
Office of the CAO	Clerks	Resolving Customer Inquiries & Complaints	6,760	0.03	
Office of the CAO	Clerks	Resolving Enforcement Issues	1,304		average of 2016 - 2022
Office of the CAO	Communications	Number of Website "Tickets" Submit by Employees	1,000		average of 2020-2022
Office of the CAO	Service Halton Hills	Resolving Customer Inquiries & Complaints	2,860	0.03	

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Office of the CAO	Service Halton Hills	Triaging Incoming Customer Connections	6,240	0.02	
Office of the CAO	Clerks	Actioning Parking Exemptions	3,195		average of 2018 - 2019
Office of the CAO	Clerks	Issuing Parking Tickets	5,450		average of 2018 - 2020
Office of the CAO	Clerks	Parking Tickets Paid by Customers	4,687		average of 2018 - 2020
Organization	Multiple Units	Completing Business Licenses	103		average of 2016 - 2022
Organization	Multiple Units	Completing Dog License Requests	168		average of 2016 - 2022
Organization	Multiple Units	Resolving Customer Inquiries & Complaints (Mitel - Calls)	101,880	0.03	Jan - Oct 2022
Organization	Online Services	Number of Online "Forms" Submit by Customers*	9,043		
Organization	Online Services	Number of Website Page Views	2,925,651		
Planning & Development	Development Review	Completing Reviews & Approvals	124		average of 2016 - 2022
Planning & Development	Overall	Resolving Customer Inquiries & Complaints	1,040	0.25	
Recreation & Parks	Recreation	Completing Marketing & Communications Tasks	1,820		
Recreation & Parks	Recreation	Completing Payments for Various Services	24,544	0.08	
Recreation & Parks	Recreation	Completing Recreation Program Registration	14,560	0.375	
Recreation & Parks	Recreation & Facilities	Resolving Customer Inquiries & Complaints	20,384	0.375	
Transportation & Public Works	Building Services	Actioning Violations	77		average of 2016 - 2022
Transportation & Public Works	Building Services	Completing Building Permits	867		average of 2016 - 2022

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Transportation & Public Works	Building Services	Completing Customer Service Interactions	307	average of 2016 - 2022
Transportation & Public Works	Building Services	Completing Permit Inspections	6,275	
Transportation & Public Works	Development Engineering	Completing Entrance / Road Occupancy Permits	51	average of 2016 - 2022
Transportation & Public Works	Public Works	Completing Service Requests	2,241	average of 2016 - 2022
Transportation & Public Works	Public Works	Resolving Customer Inquiries & Complaints	2,560	0.75



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