



TOWNSHIP OF BROCK

# Core Services Review + Performance Measurement Framework (KPIs)

2023 Project Work Plan

*Submitted by:*

Performance Concepts Consulting  
Uxbridge, ON

*Submitted to:*

Township of Brock  
Attn: Ingrid Svelnis CAO

November 24<sup>th</sup>, 2022

## 1.0 Introduction - Ongoing Modernization at Brock Township

Performance Concepts is pleased to present this work plan and quotation to undertake a Core Services Review and to develop Key Performance Indicators for the Township of Brock.

Performance Concepts successfully executed an Organizational Review of Brock Township across Q3-Q4 2020. As a result of that important modernization assignment, the Performance Concepts team accumulated a wide range of insights/expertise around the Township's service delivery channels, organization design, and governance model. Our team's experience/insights gained from the 2020 Organization Review will provide continuity and momentum in executing a 2023 Core Services Review and designing a go-forward framework of Key Performance Indicators (KPIs).

Prior to the 2022 municipal election, the Township was fully engaged in systematically implementing the key recommendations from the 2020 Organization Review. A Core Service Review (CSR) is a logical next step in the Township's ongoing modernization efforts, and the Performance Concepts team can "hit the ground running" to execute the 2023 proposed work plan. Brock's new Mayor and Council will be able to use the results of this assignment to frame their strategic priorities for the upcoming term, drive efficient service delivery, and build a results-based culture of taxpayer accountability using KPIs to set service delivery performance targets. Future budget cycles will be informed by the results of the CSR and service delivery targets derived from Key Performance Indicator data sets.

### 1.1 Our Approach to Core Service Reviews

A CSR can/should be integrated with a robust portfolio of Key Performance Indicators. Together these tools equip a municipality to *Do the Right Things* while simultaneously *Doing Things Right*.



## 2.0 Methodology & Work Plan

Our proposed methodology provides a flexible/adaptable framework for executing the assignment. We propose a hybrid approach that combines in-person facilitated working sessions with supporting sessions using online engagement. We also understand that the proposed timing of Work Plan components may be subject to change based on unavoidable internal Township priorities such as the 2023 budget process. Staying nimble is the key! We can work with Brock to reconfigure the Critical Path as required. The methodology components have all been positioned within a Critical Path (GANTT) on page 6 of this work plan.

### 2.1 Kick-off & Data Transfer

A strong assignment kickoff is premised on clear communication and a timely transfer of necessary information/data. It is important that both staff and Council understand the approach, timing, and deliverables.

#### 2.1.1 Execute Service Delivery Data Transfer/Access

- Performance Concepts will develop an inventory of information/data we require to prepare for timely execution of the work plan. This inventory will be organized around forward-facing Brock services. It will be delivered by mid-December and ideally returned by Brock in early to mid-January 2023.

#### 2.1.2 Project Orientation - Township Staff Team

- Performance Concepts will execute a project orientation session with the Brock staff team. The orientation session will address the CSR and KPIs approach, project timing and expected deliverables. Time and effort commitments required from the Brock staff team will be clearly explained, as will the role of Council in the project.

#### 2.1.3 Project Orientation - Council Briefing

- Performance Concepts will execute project orientation session(s) with the Brock Council members. The orientation session(s) will address the CSR + KPIs approach, project timing and expected deliverables. Time and effort commitments required from the Brock Council will be clearly explained.

## 2.2 Performance Measurement Framework Design + KPI Selection

The design of the performance measurement framework (including KPIs) will equip Brock to set future oriented (measurable) service delivery performance targets. KPI data sets will support public results-based reporting, inform the annual budget process, and contribute to the CSR objective of shedding low value-added workload.

### 2.2.1 Performance Measurement/KPI Primer for Brock Management Team

- Performance Concepts will facilitate a Performance Measurement/KPI Primer for Brock. The Primer will deal with key measurement ideas/concepts, set out appropriate KPI categories, and provide a robust “how to” set of techniques and insights that can be used in subsequent facilitated/interactive workshops.

### 2.2.2 Performance Measurement Workshop 1 - Documenting Core Services & Desired Service Delivery Results

- Before KPIs can be selected/designed, Brock needs to be crystal clear about the Desired Results that should be achieved when delivering its core services to the public. Once Core Services have been documented, Desired Results can be properly described in simple/clear English. Service levels can then be established and perhaps even quantified.

### 2.2.3 Performance Measurement Workshop 2 - Establishing KPIs for Core Services

- A portfolio of KPIs can be “tried on for size” for each Brock core service. KPI categories (buckets) often include Outputs, Efficiency, Effectiveness/Quality. In tandem these categories will allow Brock to assemble KPIs that measure countable units of service, unit costs/price, and the effectiveness of the service in achieving a community-focused result.

### 2.2.4 Performance Measurement Workshop 3 - Establishing Measurable Targets for Core Services

- KPIs measure results looking backwards (accomplishments achieved). However, these data sets can/should inform future-oriented target setting. A transition from soft targets to stretch targets will be produced for KPIs across all core Brock services.

### 2.2.5 Performance Measurement Workshop 4 - Establishing KPI Data Population Plans for Core Services

- If the marginal cost (effort) to populate a given KPI is greater than the marginal benefit of measurement, then that KPI should be scrapped. This workshop will build-out the data population plan for each core service’s selected KPIs. It will confirm which existing information systems/sources will populate each KPI and who is responsible for ensuring practical/ongoing data updates (feeding) of the KPIs. A low/acceptable *effort vs reward* factor for populating indicators is critical to an ongoing/sustainable performance measurement system.

## 2.3 Council Future Focus Strategic Priorities

Informed and empowered by the process of establishing KPIs for each core Brock service, the focus of the project will shift to establishing Council strategic priorities. These strategic priorities are the front-end of a Core Service Review - they set the stage for where Brock needs to look when shedding low value-added work and where Brock may need to augment existing resourcing levels.

### 2.3.1 Conduct Brock Current Situation Analysis

- Performance Concepts will work with Brock staff to prepare/deliver a data driven Situation Analysis to Council. Fiscal data, demographic data, development forecasts, and other operational data sets will inform the analysis. This briefing will be organized in a SWOT format. The SWOT will evaluate the internal strengths/weakness of the Brock organization as well as the external opportunities/threats facing that organization. Problems needing strategic solutions will emerge.

### 2.3.2 Establish Council's End-of-Term Results Brand

- All successful CSRs begin with the *End in Mind*. This interactive education session (not a Council meeting) will permit Council members to consider the end-of-term Results Brand they wish to secure. Are they a fiscal restraint Council? Are they a "Cut the Ribbons" Builders Council? Are they a Grow-Grow-Grow Pro-Development Council? There are many Results Brand options/hybrids to consider. The preferred Brand will inform the rest of the CSR exercise.

### 2.3.3 Identify Council's Wildly Important Goals

- Municipal Councils can sometimes fall victim to the urge to have lots of priorities. It is hard to say No to good ideas. Importantly, the management science is clear. If you try to focus on 10 priorities simultaneously, you will achieve none and actually end up having no priorities. Your organization's strategic agenda will be a mile wide and an inch thick. You will fail (according to the science). Focusing *simultaneously* on a small number (2-3) Wildly Important Goals at any given point in time is the recipe for strategic success. Council's 2-3 Wildly Important Goals (aligned with its Results Brand) will drive the technical aspects of the CSR and will inform future budget cycles and operational planning at Brock. It is critical to note that completed Wildly Important Goals can be replaced over time with new ones. In this sense, Council may have 10 priorities but chooses to deal with them in clusters of 2 or 3 at a time.

## 2.4 Triage Service Delivery

Core Service Reviews are hard. They require a municipality to stop doing things Council and/or staff once thought were good ideas. Cleaning house (decluttering) is never easy, but it is necessary.

### 2.4.1 Establish Triage Tool/Filter

- A rational approach to CSR de-cluttering requires an objective filtering tool. That tool can be used to triage entire Brock services and/or identify specific elements of service delivery for de-cluttering or alternative delivery mechanisms. Service sharing with other Durham or border municipalities can be considered. Offloading to community organizations can also be considered, as can simply eliminating delivery all-together. A filtering algorithm will be developed to support triaging and house cleaning/de-cluttering

### 2.4.2 Triage/Filter Brock Services

- Performance Concepts and Brock staff will use the Triage tool/Filter to actively develop options for shedding low value work, restructuring services, and re-deploying finite \$ resources to service delivery areas aligned with Council's Results Brand and Wildly Important Goals.

### 2.4.3 Develop Internal Core Services Restructuring Road Map

- The only way to eat the CSR "change elephant" is one bite at a time. An internal restructuring Road Map will be developed to guide CSR implementation over the upcoming term of Council and its annual budget cycles. The result will be rational, multi-year change management that is sustainable and achievable. The result should be a "Sustainable Brock."

## 2.5 Reporting + Public Communication Rollout

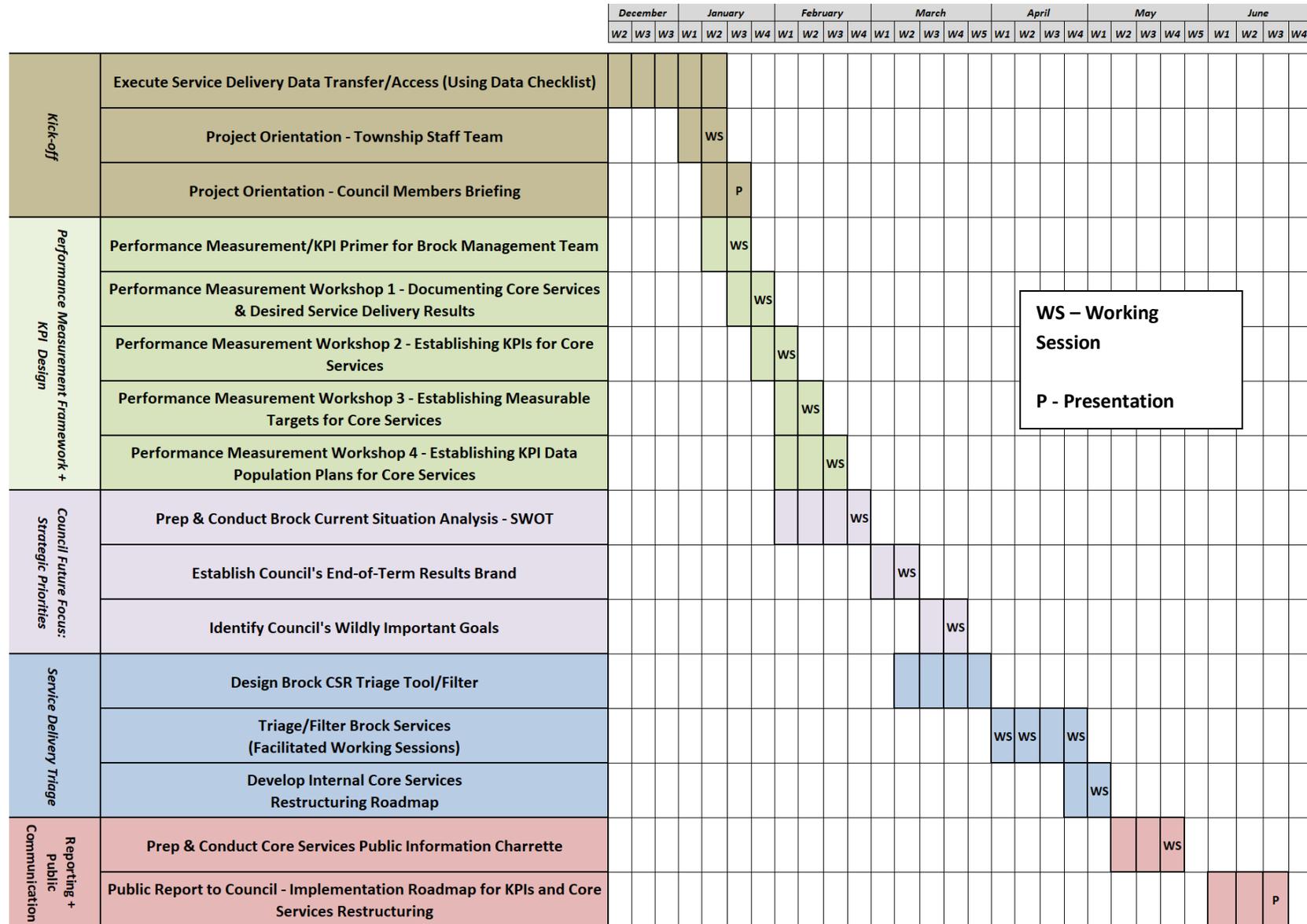
### 2.5.1 Core Services Public Information Charrette

- Brock Council and staff need to inform the taxpaying public about their path forward. Change is not always welcome by all residents. But a clearly communicated Road Map that explains how/why Brock may end up doing fewer things moving forward (but will do those things very well) is a powerful message in the experience of the Performance Concepts team. Focus and sustainability are paramount.

### 2.5.2 Public Report to Council - Implementation Roadmap for KPIs & Core Services Restructuring

- We will bring the *Do Now, Do Soon, Do Later* Road Map forward for official receipt by Council. KPI implementation and CSR execution will be the focus of the Road Map. The stage will be set for KPI tracking to begin and the preparation of soft targets for the 2024 Budget process can commence. Brock's successor to the current CAO will have a plan to execute - a major inducement to attract topflight talent.

2.6 Critical Path (Gantt Chart)



## 3.0 Assignment Budget

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### 3.1 Capped Project Pricing/Budget

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Performance Concepts Consulting will deliver the Core Services Review + KPIs assignment (as scoped) for an upset (capped) fee of:

*Forty-Eight Thousand, Five Hundred, Fifty-Five dollars plus applicable HST*

**\$48,533.00 + HST**

Invoicing will occur periodically upon mutually agreed completion of major assignment components.

## 4.0 Project Team, Qualifications and Relevant Experience

The Performance Concepts team for Brock's 2023 Core Service Review + KPIs project features decades of municipal sector leadership, deep change management experience, and a proven track-record executing CSRs and implementing performance measurement frameworks/KPIs.

The Performance Concepts team has earned credibility across the Canadian municipal community; developing deep client relationships that have resulted in repeat engagements with many clients over a number of years. Both Todd MacDonald and Tony Quirk played leadership roles in executing Brock's 2020 Organizational Review - a project organized/funded via the Province's Municipal Modernization Program.

Performance Concepts Consulting will deploy a seasoned and agile team that specializes in Core Service Reviews, Council Strategic Priority Setting, and Performance Measurement toolkit design.

### 4.1 Performance Concepts Team Members

#### 4.1.1 Todd MacDonald - President Performance Concepts

##### *Project Director & Technical Lead on Performance Measurement/KPIs*



Todd will oversee the Performance Concepts team and coordinate project-wide matters with Brock. Todd will also serve as the Technical lead on Performance Measurement/KPI deliverables.

Prior to establishing Performance Concepts Consulting in 2001, Todd enjoyed a fifteen-year career in the Ontario public service – working for the Government of Ontario (Ministry of Finance, Office of Federal-Provincial Relations) and then in progressively senior positions with the Peel and York regional governments in Greater Toronto.

Todd is skilled in managing/executing municipal modernization reviews and designing/implementing performance measurement toolkits – having worked extensively with local governments across Canada. Todd is also well versed in the political and operational realities of Canadian municipal governments, drawing insights and lessons from his 25+ years of experience in local government and as a specialized municipal sector consultant. During his local government career in Peel and York, Todd designed and implemented Operational Reviews, Efficiency Studies, Performance Measurement and Activity Based Costing toolkits, and Results-Based Business Planning frameworks. He also led major corporate projects on GTA governance and Property Tax Reform. As the original Project Manager for the Ontario Municipal Benchmarking Initiative (Now the Municipal Benchmarking Network – Canada), Todd developed wide-ranging project management, stakeholder facilitation and technical benchmarking expertise.

## 4.1.2

**Michelle Casavecchia-Somers - Performance Concepts Senior Associate*****Project Manager and Municipal Change Management Senior Advisor***

Michelle is a relatively new addition to the Performance Concepts Team. She has already distinguished herself leading a municipal service sharing assignment for the City Elliot Lake and a group of smaller surrounding municipalities. Michelle has joined Performance Concepts after a distinguished career as a municipal CAO in Malahide Township and other medium-sized Ontario municipalities. During her tenure as the Malahide CAO, she was involved in a range of negotiated service sharing projects with her neighbouring municipalities in East Elgin.

Michelle brings a depth of experience in senior staff collaboration and Council communications. She will lead the Brock CSR, consistently supported by Tony Quirk and also by Project Director Todd MacDonald as/when required.

## 4.1.3

**Tony Quirk - Performance Concepts Senior Associate*****Analytics & Change Management Specialist***

Tony has accumulated extensive public, private and non-profit sector experience/insights during his career.

During his time as an elected official, Tony served on local Town Council, the local Business Improvement Area, and on Regional Council. As Audit Committee Chair at the Region, Tony implemented a series of innovative Value for Money Audits that secured sustained operational and capital savings. Tony also served as Chair of the Audit, Budget, and Strategic Planning Committees of a major Conservation Authority.

As of 2019, Tony joined the Performance Concepts team - providing a wide range of analytical and advisory services to municipalities across Canada.

Tony will technical/analytical support across both the CSR and performance measurement deliverables within the Brock assignment.