

The Corporation of the Town of Lakeshore

Report to Council

Legislative & Legal Services

Human Resources



To: Mayor & Members of Council

From: Lisa Granger, Manager of Human Resources

Date: September 30, 2020

Subject: Tender Award for Consultant for a Corporate and Organizational Review

Recommendation

Award the contract for a Corporate and Organization Review to Optimus SBR in the amount of \$101,600 plus non-refundable HST to be funded in part from the Modernization Grant funding and in part from the 2020 Budget; and,

Direct the Mayor and Clerk to execute the formal contract, as further described in the report presented at the October 6, 2020 Council meeting.

Background

The Town of Lakeshore has experienced significant growth in terms of development over the past couple of decades. The Town is expected to continue to grow. In the past 5 to 10 years, the Town has grown from a small town to a mid-size Town. As development continues to increase in the municipality, the Town will grow from a mid-size Town to a large Town or small city. As a result, the demand for services has increased on the Town and the organization is struggling to keep up with the demand with the current organizational structure, current staffing model and modernizing technology.

In consideration of the significant growth pattern the Town has been and will continue to experience, it is best practice to conduct an organizational review every 5 to 10 years or sooner if the recommendations of the previous organizational review have expired or have been exhausted. The last organizational review for the Town of Lakeshore was completed in 2015 and all the recommendations have been exhausted.

This best practice is reflected in the Town's 2019-2022 Strategic Plan. One of the guiding themes in the Strategic Plan is Organizational Excellence. The Plan contemplates the Town making

... strategic internal investments to enhance customer service, service delivery, and resourcing to address the growing expectations brought about by recent population growth. The Town will provide enhanced focus on improving internal and external communication by leveraging new technologies and creative public engagement to support transparent and inclusive decision making.

Under section 5.1 of the Strategic Plan, the strategic direction is to align service delivery with community expectations and the progress indicator for alignment is undertaking an organizational review to align levels of service with staffing requirements 2020.

Administration has completed a Request for Proposals process for a consultant to complete a corporate and organizational review ("Review").

Comments

Administration undertook a competitive procurement process through a RFP for consultant to conduct the Review. The proposal submission period was open for 4 weeks and closed on September 18, 2020. The Scope of Work for the project is attached as Appendix "A" to this report.

There were 20 plan takers for the RFP. Of the 20 plan takers, 8 submitted a proposal and all of the 8 were compliant proposals. The 8 proposals were evaluated by the Evaluation Committee in a 2 stage process where proposals were evaluated based on:

- The work plan;
- The project team, experience and qualifications and references;
- Interview; and,
- Financial proposal.

As a result of the evaluation, Optimus SBR achieved the highest score and as such it is recommended that the Town award Optimus SBR the tender.

Financial Impacts

Council approved \$200,000 in the 2020 budget for a Service Delivery Review and Organizational Review. In addition, the Town was successful at receiving \$120,000 in grant funding as part of the Municipal Modernization grant program. The cost of the Service Delivery review including the IPSOS survey will be approximately \$85,478 including HST. The Organizational Review will be \$103,388 including HST. The total cost for both the service delivery review and the org. review is expected to be \$188,866. With the grant funding, the Town will be contributing \$68,866. Any unspent budgeted dollars will be transferred back to the plans and studies reserve for future projects.

Below is a summary of the project funding;

Service Delivery Review/ Organizational Review Project	
Service Delivery Review	\$61,056
IPSOS Survey	24,422
Organizational Review	103,388
Total Project Cost	\$188,866

Project Funding	
Modernization Grant	\$120,000
2020 Budget	68,866
Total Funding	\$188,866

There may be financial implications arising from the Review itself. These implications will be identified during the course of the review and presented to Council for consideration in early 2021.

Report Approval Details

Document Title:	Tender Award for a Consultant for the Organizational Review.docx
Attachments:	- AppendixA-ScopeofWork.pdf
Final Approval Date:	Oct 1, 2020

This report and all of its attachments were approved and signed as outlined below:

Kristen Newman

Rosanna Pellerito

Truper McBride