

Attachment "A" - Scope of Work

Town of Lakeshore

Request for Proposal: Corporate Service & Organizational Review

Closing Date: September 18, 2020

3.12 Term of Contract

The term of the Formal Contract will be from the date of execution of the Formal Contract to and including November 30, 2020. By submitting a Bid, the Proponent agrees to perform the Work within this term.

4.0 Terms of Reference

Project or Program Requirements

4.1 Introduction

The Town of Lakeshore is a lower tier municipality in southwestern Ontario. The Town has a population of approximately 38,000 and is one of the fastest growing municipalities in the region. The Town is one of the largest municipalities in Essex County by size with a mix of urban and rural areas. The Town wishes to undertake a comprehensive service review and organizational structure review including evaluation of workloads and resources to best position the organization for current and future success and to meet the service level expectations of elected and non-elected officials, residents, the business community, and visitors. The Town is currently undergoing a high level service delivery review. The results of that review will serve as a base for a more comprehensive service review in conjunction with an organizational structure review.

Currently, the Town has 381 active regular employees, including:

- 110 full time employees (34 non-union and 76 union employees);
- 271 part time employees (approximately 150 non-union and 28 union employees and 93 volunteer firefighters).
- Additionally, the number increases by about 40 - 45 student positions during the summer.

4.2 Scope of Work

The Town of Lakeshore is seeking an experienced and qualified consultant with an interdisciplinary team to lead a comprehensive corporate service and organizational review to be completed no later than December 31, 2020. The review is intended to provide Lakeshore Administration the following:

- A plan for service delivery improvements and workflow management;
- An organizational plan to restructure the administration to improve the delivery of service over a 15 year horizon;
- An assessment of current human capital resources and recommendations on realigning roles, as may be required, with our existing talent;
- An assessment of human capital resource needs to improve service delivery over a 15 year horizon;
- An assessment of current IT infrastructure, gap analysis, and IT Master Plan to support efficient effective service delivery across and within the organization; and,

- Maintain an iterative project management plan throughout the course of the project for use with the Town's Project Steering Committee.

Part 1: Service Review

The Work shall include an Evidence-based service review of the organization which shall include, at a minimum:

- a) Specific recommendations and options for processes to achieve desired service levels. The recommendations shall include consideration of the following:
 - i. a view to potential costs and foreseeable benefits for the organization in terms of legislative compliance, health and safety, efficient administration, public access, customer service, and effective coordination of municipal operations, where applicable;
 - ii. trends in municipal service delivery;
 - iii. a consideration of alternative service delivery methods where applicable;
 - iv. reference to comparable organizations of a similar size and nature;
 - v. clarifying roles and responsibility of management and staff;
 - vi. encouraging strong communications and coordination between organizational units;
 - vii. recommended technological solutions to assist in the provision of services;
 - viii. a comprehensive change management plan to implement recommended options, and the potential impacts of options and recommendations;
 - ix. Detailed recommendations regarding service delivery and the respective human capital requirements are requested for:
 - a. Water billing
 - b. Purchasing and procurement approvals;
 - c. Risk management;
 - d. Contract management;
 - e. Fire prevention;
 - f. Fire suppression;
 - g. Engineering (includes current engineering services and operations divisions);
 - h. Operations Work Order Processing and Execution of Work
 - i. Development application approvals (including ways to improve the use of the Technical Advisory Committee in the approvals process)
 - j. Policy Development
 - k. Communications
 - l. Emergency Response Management
 - m. Project Management
 - n. Special Events

o. Corporate Properties/Facility management

Part 2: Staffing & Resourcing

1. Review of current services, current and future service levels and associated workloads, resources and accountabilities;
2. Review of current service levels and comparisons with other relevant municipal comparators;
3. Stakeholder consultation, including engagement with Council, senior management and other staff;
4. A review of the following reports/documents:
 - - i. Town organization chart (current at the publication of the RFP **attached as Appendix “A”**);
 - ii. 2019-2022 Town of Lakeshore Strategic Plan (**attached as Appendix “B”**);
 - iii. 2020 Service Delivery Review (to be provided to the Consultant upon the commencement of the Work);
 - iv. Prior Organizational Review reports (confidential to be provided to the Consultant upon the commencement of the Work).
5. Preparation of a draft plan no less than 45 days prior to the termination of the Formal Contract to present to the Contract Administrator describing the plan to implement and maintain the recommended improvements to achieve the desired level of service. The plan shall include:
 - b) Specific recommendations for organizational structure, resourcing and staffing levels to be implemented for 2021 through 2036, including financial impact, to achieve the efficient and effective delivery of municipal services. The recommendations shall include consideration of the following:
 - i. a view to potential costs and foreseeable benefits for the organization in terms of legislative compliance, health and safety, efficient administration, public access, customer service, and effective coordination of municipal operations, where applicable;
 - ii. trends in municipal organizational structure and staffing;
 - iii. providing opportunities for succession and the growth and development of employees.
 - iv. reference to comparable organizations of a similar size and nature;
 - v. clarifying roles and responsibility of management and staff;
 - vi. encouraging strong communications and coordination between organizational units;
 - vii. alternative staffing methods; and,
 - viii. a comprehensive change management plan to implement recommended options, and the potential impacts of options and recommendations.

Value Add/Innovation Additional Information: The Proponent may include information regarding the added value that the Proponent's Team can bring to the Work and include information describing any innovative approaches that it would incorporate into the Work. While not required, this information will form part of the evaluation for the RFP.

4.3 Roles and Responsibilities

By the Proponent:

1. Conduct review and develop assessments and requested plans;
2. Maintain an iterative project management plan for use with the Town's Project Steering Committee (including milestones, stakeholder list, task schedule, communications plan, critical success factors, scope, budget and change management plan)
3. Prepare written draft report for presentation to Town's Project Steering Team.
4. Provide final written report for presentation to Town's Senior Management Team.
5. Present the final written report to Council.
6. Provide written and oral updates to the Contract Administrator.

By the Town:

1. Provide project steering team and assign project manager.
2. Provide information upon Consultant request.
3. Assist with the coordination of the review in accordance with the methodology.

4.4 Experience and Qualifications

The successful proponent should have knowledge of the following:

- a. Municipal government and operations;
- b. Knowledge of best practices in public sector organizational process development, review and design, including but not limited to human resources and information technology.;
- c. Project Management

The successful proponent should have experience in the following areas:

- d. Experience designing municipal processes and developing strategies and recommendations for implementing organizational restructuring;
- e. Developing master plans;
- f. Ability to provide services in a timely and effective manner;
- g. Experience drafting written reports for presentation to organization leaders and municipal councils, including reports which will form part of the public record; and,
- h. Experience presenting to organization leaders and municipal councils.

5.0 Proposal Submission Instructions

5.1 Mandatory Information