The following document showcases outcomes from a resource request prioritization exercise related to risk & benefit assessments for the 2025 resource requests submitted to the Strategic Leadership Team in 2024. The risk assessment exercise was based on expected value per position as it related to core service, strategic goals, and organizational skill gaps, with a significant focus placed on value added to core service. As illustrated below, the risk assessment led to the prioritization of **3 permanent resource requests from a total of 20** to move forward for approval for the 2025 budget deliberations.

Risk Matrix - Prioirity List (Final Resource Requests)

A risk matrix ranking system for prioritizing position requests was used to evaluate each request across specific impact areas and likelihood of need. Requests had been ranked on three primary criteria:

1. **Impact to Core Services**: Measures how the position will support essential functions, ensuring continuity and reliability in key municipal services.
2. **Advancement of Strategic Goals**: Assesses how well the position aligns with and advances broader organizational priorities and strategic initiatives.
3. **Organizational Skill Gap**: Considers the degree to which the role addresses existing skill gap, enhancing capabilities across the organization.

Positions that ranked highest are more likely to significantly impact service quality, strategic progress, and critical skill acquisition. Included below is an outline of the key position details for each position selected for approval for the 2025 budget on-ramps, based on the outcome of this risk assessment and Strategic Leadership review.

2025 Resource Requests Organizational Benefits

Position Title	Work Area	Cost[1]	Benefit Breakdown	Risk Categorization
Business Services Technician	Permits & Assessments	$122,000	• Delivers a one-stop solution for permit inquiries, enabling faster, more accurate service and reducing repeat visits. • Reduces dependency on specialist staff by improving cross-team collaboration and communication. • Streamlines regulatory steps by handling multiple requirements simultaneously, minimizing redundant processes. • Supports automation and better-defined workflows, improving overall process efficiency. • Allows existing staff to focus on higher-priority tasks by managing application intake and coordination. • Resolves conflicts between Economic Development's support role and the regulatory demands of business licensing. • Speeds up planning and building permit approvals through dedicated customer follow-ups and process adjustments. • Relieves pressure on planning and permitting teams, helping prevent burnout and fostering a positive workplace. • Closes a critical gap in application intake capacity, ensuring timely responses and better service delivery.	High
IT Security Analyst	IT	$160,000	• Addresses rising cyber threats, particularly in the utilities sector, to protect critical services like water and wastewater treatment. • Provides essential support to the existing Network Security Specialist, enabling broader coverage of cybersecurity needs. • Helps reduce cybersecurity risks by supporting compliance, regulatory standards, and protection of sensitive data and critical infrastructure. • Fills an internal skills gap, advancing IT risk management and the town's cybersecurity maturity. • Aligns with strategic goals to improve cybersecurity posture, resilience, and public trust by proactively safeguarding municipal systems and data. • Mitigates risks of costly recovery efforts by strengthening defenses against potential incidents, similar to recent municipal cyberattacks in Canada.	High
Legislative Affairs Officer	Legislative Affairs	$122,000	• Supports critical Council functions by managing agendas, hearings, and meeting documentation, easing pressures on the Manager for the 2025 election focus. • Mitigates new legislative demands from Bill 20, including creating and managing a voter list, campaign disclosures, and election ballot processes. • Addresses significant workload increases from ARB, LARB, and SDAB hearings and the added complexities in legislative work since 2022. • Enhances policy and bylaw development support, especially as demand has doubled, and supports administrative guideline updates for high-risk HR policies. • Strengthens FOIP and records management capabilities in response to exponential growth in FOIP requests and RIM responsibilities. • Manages records migration and cleanup for Microsoft 365, reducing legal risk and enhancing information findability and compliance.	High

---

[1] *Annualized all-in costing estimate for total budgeting.*

Budget Service Change Request

Service Change Type

☒ New Service

☒ Service Update

☐ End of Service

SALARY AND WAGE ADJUSTMENTS

This report outlines the need for additional budget allocation to create new positions that are essential for the effective implementation of our strategic plan and the delivery of core services. These positions are designed to enhance our organizational capacity, drive strategic initiatives, and ensure successful execution of our goals.

The Strategic Leadership team reviewed a total of 20 positions that were requested, and 3 positions have come forward for approval. Risks considered were operational service delivery, strategic service delivery and organizational skill gaps. The business support technician aligns with our 'open for business' philosophy and targets a resource to support business in the building and development permit process. The legislative affairs officer is required to support ongoing and increased legislative requirements to support the election process, especially the establishment and maintenance of a voters list and the IT security analyst is to support the risk facing the organization from cyber and security threats.

Resource Requests			
Position Title	FTE	Type	Estimated Annual Cost[1]
Business Support Technician	1	Permanent	$ 122,000.00
Legislative Affairs Officer	1	Permanent	$ 122,000.00
IT Security Analyst	1	Permanent	$ 160,000.00
Total:	**3**		**$ 404,000.00**

The business cases that follow have been created for each position going forward for approval to serve as an evaluation method for Council. Each business case outlines the following:

1. The Position Details
2. Reason for Hiring
3. Expected Key Responsibilities
4. Evaluation of Alternatives
5. Organizational Benefits

---

[1] *All-in estimate inclusive of benefits package and financial impact of recent market review changes.*

New Resource Request – Legislative Affairs Officer

Position Type

☒ Permanent

☐ Temporary

☐ Reclass of Existing

Is this position a Strategic or Core Service requirement

☐ Strategic

☒ Core Service

What FTE is being requested? (Enter a numeric figure) - **1 FTE**
Expected date of hire - **1/1/2025**

Reason for Hiring

The existing Legislative Officer FTE was reclassified as a Senior Legislative Affairs Officer to support as a backup to the Manager role and take on a senior role. The Senior Legislative Affairs Officer was needed to provide oversight on Council agenda/process control. The senior role is to act as Substitute RO, run the quasi-judicial hearings (CARBs, LARBs, SDABs) and administrative guideline drafting (and assist with FOIP/Ombudsman pressures). This Senior role ensures legislated processes/hearings, including internal policy development that may be appealed to the courts follow administrative law, and are dealt with consistently and properly.

This reclassification of the existing Legislative Affairs Officer to a senior role has enabled the team to tackle more strategic legislative work and alleviate pressures from the manager. However, new pressures and demands have also created a need for an additional legislative affairs officer to assist with the core business and operational tasks that have increased significantly.
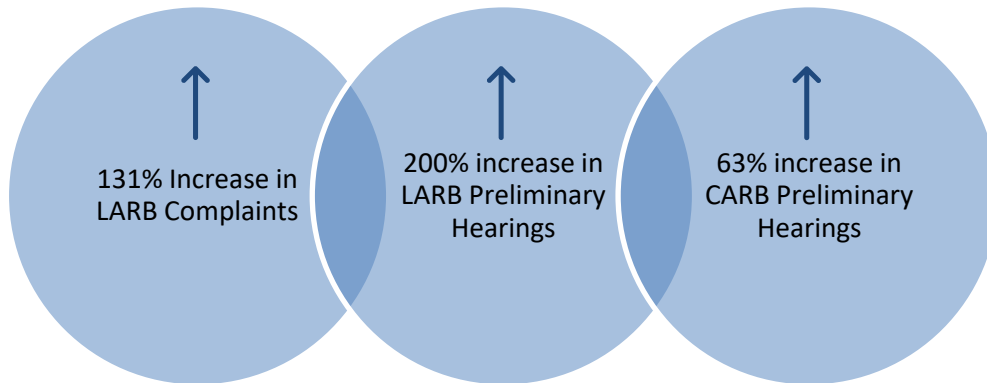

131% Increase in LARB Complaints

200% increase in LARB Preliminary Hearings

63% increase in CARB Preliminary Hearings

Figure 1 - Service Workload Increases (2024 Compared to 2023)

With the legislative changes to the MGA under the recent Bill 20, the pressure on legislative services to now create and maintain a permanent voter's list, post campaigning disclosures (track potential candidate annually) and hand count ballots, and manage the mail-in special ballot process while still conducting core business will be very challenging. The election processes will need to be run along with all the regular core business of Council agendas, meetings, minutes, policies, bylaws, administrative guidelines, council support, committee supports and resident inquiry support. Succession planning for the legislative services team is now critical with one member departing at the end of 2024.

Service Level Changes

Impact to Team and Manager

With the workloads and lack of notifications from business centres regarding emergent issues, it has meant that the team unfortunately continues to work in a reactive mode. The Manager position is involved heavily in the day to day roles of the team. In 2025, the Manager will need to be devoted solely to election execution. The team will need to continue providing core work and support in addition to some election tasks. With this FTE bylaw and policy planning/support could be planned and scheduled in a proactive manner.

Increases to Work Load

The only increase in positions for Legislative Affairs was in 2015 with the hiring of the Manager's position. While there have been a slight decrease in Council Committees (MPC, F&A) all the processes still remain for the team (advertising, hiring, orientations/Code of Conduct presentations, support for recording secretaries, member appreciations).

Since Covid 19, the staff required to support a Council/GPC meeting has tripled with the Manager in attendance and 2 Legislative Officers required to run the online meeting platform, act as recording secretary and live streaming of meetings. Before Covid one Legislative Officer could attend and fully run the meetings.

ARB hearings, specifically LARBs, have increased 6 fold since 2022 and have created triple the work with the requirement to schedule a preliminary merit hearing before the actual hearing can be scheduled in a large number of hearings. It took an estimated 170 hours of one FTE to Clerk the ARB hearings in 2024.

SDAB hearings have been taken on by the Legislative Affairs team, with 2 hearings being held in 2024, from a number of 0 from 2018 to 2023. The Legislative Affairs team took over responsibility for conducting SDAB hearings from CGIS in 2022 with no transfer in funding for legal and hearing costs.

Bylaw and policy gaps continue to exist even though team support of all business centres for bylaw and policy development has increased.

Year	Bylaw Support from Legislative Affaris
2022	19
2023	38 *(100% increase from 2022)*
2024 – January to May	24 *(Bylaws on target to remain at 2023 targets)*

Key administrative guidelines are missing in the Town. An example of this is the support for HR administrative guidelines. The personnel policy was from the 1990s and the updating/rewriting with HR was to start with the core 15. The demands for administrative guidelines are increasing but due to the HR risks we have prioritized those guidelines. 5 non-core HR Administrative Guidelines are outstanding as of August 2024. Approximate Guidelines processed over the last two years include:
- Completed Guidelines - 16 (some of these include the extensive HR amendments to existing guidelines);
- Draft Guidelines - 15 (have been started and are on hold);
- Amendments to Guidelines - 14 (not including the HR guidelines).

The current governance policy framework was adopted in its entirety in May 2021. Additional policies have been added and some repealed. There are 71 policies current policies. Of the approved Council policies only 7 have been reviewed with Council this term.

Election support for new documents/processes due to Bill 20 changes would also be supported by this position. This is somewhat an unknown with no clear requirements for voters lists, etc. specified by the province at this point.

This position will also support the quality and ability to support business centres with the legislative processes and support the records management team with FOIP, and records management processes.

The work for the Records Management team of 2 has grown exponentially:

Item	2021	2022	2023	Jan – June 2024
FOIP Requests	3	11	10	11 *267% increase since 2021*
OPIC Investigation/Other	1	1	2	3 *67% total increase since 2021*
Boxes Transferred Offsite	59	73	80	96 *Without rolling shelves counts*
Business Processes/Forms/Contracts/ Leases/Land Transactions Review for RM and Privacy and Quality check/control	- No stats	19 Partial stats	133	256
Total number of records on Network Drives	1.6 M	1.7 M	1.9 M	2.08 M

RIM Consultation and advice sessions for business centres and training sessions for records liaisons, Laserfiche Web Client and RM/FOIP have increased, (2022 conducted 19 and in 2023 conducted 41).

With the implementation of Microsoft 365, the clean-up of the network drives is a priority to not transfer everything into a clean environment.

With a better resourced RM team the following benefits could be expected:

1. Records Volume Reduction - , deletion with confidence information we no longer need. Information can be deleted in a legally defensible manner (requires update of retention schedule legal citations which was last completed in 2016
2. Increased Findability – When transitory information and information that has met retention has been deleted, and valuable information properly identified, it will be far easier to find what we need, when we need it.
3. Increased Compliance – We are required to comply with FOIP and as such must follow sound information management processes. If challenged, we might have difficulty with digital retentions on the network drives and proving compliance.
4. Decreased Legal Risk – Storing more information than required increases the risk of legal action in the future (as well as significantly increasing legal costs in response to litigation, or regulatory sanctions.

This would provide some capacity to the regular RM members to deal with FOIP/OPIC and AI project pressures.

Expected Key Responsibilities

- Attend and record Council meetings
- Prepare Council agendas for approval, public and special hearings and associated follow-up
- Provide information, legislative advice and processes to Boards, Council, its Committees and recording secretaries
- Respond to resident/public inquiries
- Records classifications, retention and disposals – assisting with lifecycles of records management
- Advising business centres on proper records management practices
- Assisting with records inventories and building records file structures
- Clean-up for transition to Microsoft 365
- QA checks for forms/processes
- Paper records storage and transfers and disposal
- I will also be using 1 of the 2 member current RM team to assist with election 2025 (as was done in 2021 leaving very little capacity in 2025).

Estimated Annual Cost

- Band 5 – Budgeted estimate B5-6 = $90,733

Evaluation of Alternative Options

Options	Annual Costs	Pros	Cons
Ask Ad Hoc to fill in/support	Lieu banks/staffing hourly	Saving $$ of hiring a FTE	1. Risk of not having support at Council meetings to livestream/record, run the meeting software 2. Risk of not having trained support for Council packages, processes, minutes, bylaws 3. Risk of not having support for election requirements 4. Risk of not having trained support with at least one known upcoming retirement(s) 5. Burnout of current staff 6. Risk of legislative non-compliance with prescribed processes 7. Risk of legal challenges due to inexperienced staff running legislated processes (election, bylaw, census, public hearings).
Put policy development on hold until after 2025 – concentrate on election and urgent policy – no policy	0	No extra costs incurred – no other resource management required	Better policy support – policies needed are created – policy gaps are reviewed - the service level of policy review of all policies once per Council term may not be completed – new written election

review for this Council term.			processes may not fully be completed
Borrow staff members across the organization who may have records background and may be available	Staff member hourly rates and backfill rates	An FTE is not required	We have tried this tactic but the resources are not usually available when needed. This worked once with a massive FOIP request using a member from Marisa's team but has not worked with the rolling shelves due to tax season at the front desk-this example was an emergent request. FOIP requests are under very tight timelines and when an extra resource is required trained resources are not available.

Position Risk Assessment

	Impact	Likelihood
Expected Value - Core Service	High	High
Expected Value - Strategic Goals	High	Medium
Organizational Skill Gap	High	High

Risk Rubric

	Impact	Likelihood
Expected Value - Core Service	**Low:** Minimal impact on core services. **Medium:** Moderate impact on core services. **High:** Significant impact on core services.	**Low:** Unlikely to affect core services. **Medium:** Possible impact on core services. **High:** Likely to impact core services.
Expected Value - Strategic Goals	**Low:** Little alignment with strategic goals; minimal long-term impact. **Medium:** Some alignment with strategic goals; moderate long-term impact. **High:** Strong alignment with strategic goals; major long-term impact.	**Low:** Unlikely to affect strategic goals. **Medium:** Possible impact on strategic goals. **High:** Likely to impact strategic goals.

Organizational Skill Gap	**Low:** Skill gap is negligible; current skills are sufficient. **Medium:** Moderate skill gap; some additional training or hiring needed. **High:** Significant skill gap; immediate training or hiring required.	**Low:** Unlikely to experience issues due to skill gap. **Medium:** Possible issues due to skill gap. **High:** Likely to experience issues due to skill gap.

New Resource Request – Security Analyst

Position Type

☒ Permanent

☐ Temporary

☐ Reclass of Existing

Is this position a Strategic or Core Service requirement

☐ Strategic

☒ Core Service

What FTE is being requested? (Enter a numeric figure) - **1 FTE**
Expected date of hire – **April 1, 2025**

Reason for Hiring

As cybersecurity incidents in Canadian municipal governments continue to rise, the growing frequency and sophistication of cyber threats have placed municipalities under significant pressure to enhance their defenses. The utilities sector, particularly water and wastewater treatment facilities, faces heightened risks due to the critical nature of the services they provide. These threats can lead to the contamination of drinking water by altering chemical levels, putting public health at significant risk. Additionally, these attacks can disrupt essential water services, leading to widespread service outages and costly recovery efforts to restore safe operations. In light of these escalating challenges, it is imperative that we allocate sufficient resources to strengthen our cybersecurity posture, ensuring the protection of our municipality's critical infrastructure and the safety of our residents.

The cyber incident on City of Hamilton in Feb 2024 is one of the biggest attacks so far in 2024 for a Canadian municipality, it is estimated the city spent $7.4 million dollar so far to recover from its impact. CyberAlberta has an article highlight some of the trends in cyber-attack of municipality and critical infrastructure: https://cyberalberta.ca/system/files/cyberminute-20240402.pdf

Currently, the Town of Okotoks has one Network Security Specialist responsible for all aspects of cybersecurity. While the town is smaller in scale compared to larger municipalities like the City of Calgary, the scope of cybersecurity responsibilities remains equally broad. In all of the 29 IT initiatives that's listed in our IT Strategic Plan for 2024 to 2026, 11 of them are directly or indirectly related to Cybersecurity. Also out of the 5 IT Goals, 2 of them are related to our Network Security Specialist, and they are "IT Risk Management" and "Cybersecurity Maturity". Given the limited human resources, we had to prioritize certain areas while inevitably delaying attention to others. As our Town continues to grow and new projects and initiatives are introduced, the responsibilities and workload associated with this position are expected to expand significantly, making it increasingly essential to manage and prioritize these evolving demands effectively.

Hiring a Security Analyst will strengthen our capabilities by providing much-needed support to our existing Network Security Specialist. Under the direction of the IT Manager and alongside the more experienced Network Security Specialist, the Security Analyst will help accelerate our efforts to cover critical cybersecurity areas, ensure compliance with regulatory standards, and better protect our municipal systems and data against evolving threats. This addition will enable us to manage the increasing complexity of cybersecurity demands more effectively, safeguarding the town's infrastructure and maintaining public trust.

The **MNP Digital Municipal Research Report** highlights the importance of cyber security and privacy for municipalities, with 76% of respondents identifying it as a top priority for the next three to five years. This emphasis reflects the growing complexity and frequency of cyber threats targeting local governments,

which often manage sensitive citizen data and critical infrastructure. Despite these challenges, many municipalities face significant internal skills gaps, making it difficult to enhance their cyber security measures effectively.

Given this context, the addition of a Security Analyst to the Town of Okotoks' IT team is not just an asset but a necessity. This position would directly address the skills gap by providing focused expertise on IT risk management and advancing the town's cyber security maturity. By supporting the existing Network Security Specialist, the Security Analyst would help ensure that the Town's technology and data are protected, enabling us to meet the evolving expectations of our citizens while mitigating the risks associated with digital transformation in all the IT initiatives.

In conclusion, hiring a Security Analyst would align with the Town's strategic goals, and is essential for safeguarding the community's digital infrastructure and reputation. This new position will help fill critical skill gaps, allowing us to cover a broader range of cybersecurity responsibilities, from protecting sensitive data to securing critical infrastructure like our water treatment facilities. With an expanded team, we can address security challenges more swiftly and effectively, ensuring that our systems are not only compliant but also resilient against emerging threats. By enhancing our cybersecurity capabilities, we can make our Town safer, better prepared, and more proactive in defending against potential cyber incidents.

Expected Key Responsibilities

- **Risk Assessment**: Identify and assess security threats to IT infrastructure.
- **Policy Development**: Create and maintain security policies and procedures.
- **Incident Response**: Manage and coordinate responses to security incidents.
- **Network Monitoring**: Monitor networks for suspicious activity and threats.
- **Vulnerability Management**: Conduct vulnerability assessments and penetration testing.
- **Compliance Reporting**: Ensure regulatory compliance and report on security status.
- **Security Training**: Provide cybersecurity training for municipal employees.
- **Access Control**: Manage user access to systems and data.
- **Threat Intelligence**: Analyze and respond to emerging cyber threats.
- **Stakeholder Collaboration**: Coordinate security efforts with departments and partners.
- **Architecture Review**: Evaluate and recommend security solutions.
- **Disaster Recovery**: Assist in disaster recovery and continuity planning.
- **Third-Party Risk**: Manage security risks of vendors and contractors.
- **Security Audits**: Conduct regular security audits and assessments.
- **Incident Documentation**: Maintain records of security incidents and responses.

Estimated Annual Cost

- Band 8 – Budgeted estimate B8-6 = $118,521

Evaluation of Alternative Options

Options	Annual Costs	Pros	Cons
Keep responsibility to current Network Security Specialist	$0	Cost saving	Increase workload and burnout – become overwhelmed with high volume of tasks, lead to delay threat detection, response, and prolong vulnerability. Limited coverage – no monitoring when the 1 person is on holiday, longer response time, increase potential damage of an incident. Expected delay in initiative roll out.
Contractors	$50,000 to $100,000	Specialized, project based one-time help	Not cost effective. Not everything can be covered by a contractor, and some projects can only stay internal because of information confidentiality.

_____

Position Risk Assessment

	Impact	Likelihood
Expected Value - Core Service	High	High
Expected Value - Strategic Goals	High	High
Organizational Skill Gap	Medium	High

Risk Rubric

	Impact	Likelihood
Expected Value - Core Service	**Low:** Minimal impact on core services. **Medium:** Moderate impact on core services. **High:** Significant impact on core services.	**Low:** Unlikely to affect core services. **Medium:** Possible impact on core services. **High:** Likely to impact core services.

Expected Value - Strategic Goals	**Low:** Little alignment with strategic goals; minimal long-term impact. **Medium:** Some alignment with strategic goals; moderate long-term impact. **High:** Strong alignment with strategic goals; major long-term impact.	**Low:** Unlikely to affect strategic goals. **Medium:** Possible impact on strategic goals. **High:** Likely to impact strategic goals.
Organizational Skill Gap	**Low:** Skill gap is negligible; current skills are sufficient. **Medium:** Moderate skill gap; some additional training or hiring needed. **High:** Significant skill gap; immediate training or hiring required.	**Low:** Unlikely to experience issues due to skill gap. **Medium:** Possible issues due to skill gap. **High:** Likely to experience issues due to skill gap.

New Resource Request – Business Services Technician

Position Type

☒ Permanent

☐ Temporary

☐ Reclass of Existing

Is this position a Strategic or Core Service requirement

☐ Strategic

☒ Core Service

What FTE is being requested? - **1 FTE**
Expected date of hire - **1/1/2025**

Reason for Hiring

The Community Planning and Design Team in association with the Economic Development and Permitting (Safety Codes) Team have identified an opportunity for both process and customer service improvements by creating a dedicated Business Services Technician position. Over the past two years, feedback related to the Town's application services, particularly as it relates to business licensing and building permits, has received considerable critique, and a program is being developed to improve processes holistically. All teams have received considerable increase in volumes, particularly in new permit applications and inquiries, while services such as business licensing are being relocated to the planning group to gain general process synergies, however without additional staffing capacity[1]. Increase in permit activity has applications sitting in the queue longer than desired, causing client frustration.

In essence, the goal is to enhance customer relationships and satisfaction by reducing wait and response times, while also providing better pre-application information and education. The role would focus on ensuring cross-functional coordination and following up with customers throughout the application process until a decision is made. This position would involve pre-screening applications upon receipt, informing applicants of their file status, and initiating dialogue within acceptable timelines via the online public portal. Trade permits could even be issued on the same day.

While the creation of online and self-serve portals is currently being developed and will assist customer service and satisfaction improvements going forwards, the Town of Okotoks would greatly benefit from the delivery of an in-person service to assist in clarifying procedure, requirements and responding to general inquiries leading up to future applications. This position would deliver front-desk service and be the first point of contact to answer phone and email inquiries for all permit related inquiries. Similarly, the introduction of online payments in 2024 will improve the 24/7 online application portal but will also require administrative support to monitor and reconcile the payments.

The request for a new dedicated position is built on the existing team capacities, especially within the administrative and technical staffing levels, which creates some challenges in delivering the envisioned service level, given the above-mentioned volume of applications and inquiries combined with other day to day team support needs. The recent 2024 organizational realignment has resulted in the reassignment of functions to leverage process synergies cross-functionally, in particular offering business licensing using planning technicians and administrative staff[2]. While advantageous and logical, this has created an

---

[1] The Economic Development Administrator Position will be moving with the Economic Development Specialists into the Community Identity Team, where this position will be the only administrator position for the broader Identity Group.

[2] There is merit to relocating business licensing as a service of the Planning and Design Group:

increase in services and volumes residing within the existing Community Planning staffing contingent. The Permit (Safety Codes) Team is currently receiving applications intake and inquiry support by a temporary part-time customer experience representative, which has alleviated capacity concerns within that team and enables greater effectiveness.

Alongside the customer service experience improvements a dedicated and skilled Business Services Technician would deliver by centrally coordinating **all** permit types (planning, safety codes and business licensing), several process improvements currently underway will add additional value, by enabling a transition of current tasks and functions undertaken by professional staff to administrative staff as a result of greater capacity, including supporting and furthering cross-functional automation, modernization of data and statistics management or skills training.

If administrative positions continue to service the day-to-day activities as currently allocated, the cycle of queuing, delays and customer frustration is expected to continue despite process improvements or online portals. While all impacted teams have introduced changes to adapt to the customer expectations, in many cases the increased volumes of applications, emails, phone calls and walk-in traffic will remain challenging for frontline team members.

What is the expected value of **Core Service?**

The expected value of the Core Service is improved customer service delivery, satisfaction and relationships through:

- The provision of complete pre-application information across the various permit requirements in a single phone call or visit, and ultimately an increase in complete applications and reduced overall processing times;
- Less referral amongst specialized individual staff members and better inter-team communication and collaboration;
- Less process stacking in favor of a coordinated parallel application process where several regulatory or code requirements have been identified;
- Greater customer/business satisfaction with Town service delivery;
- Improved process definition and systems integration, including progress in process automation;
- Increased ability for existing staff to respond to other assigned tasks;
- Increased staff well-being by alleviating workload and response pressures by enabling additional resource capacities.

What is the expected Value to **Strategic Goals?**

- Increased organizational excellence in terms of customer service, satisfaction and relationships;
- Removal of advocacy-regulatory conflict within the Economic Development Team. Economic Development Specialists work with businesses and entrepreneurs to seek out economic opportunity and to further the strong local economy, while business licensing is a regulatory service that (as still currently existing) seeks compliance with Town and provincial regulation and bylaws, and thereby may be regarded as a hurdle to business start-ups or relocations.
- A focus on applications coordination would allow reduction of "process stacking" as per the still current process and systems by advocating for required systems adjustments, with greater ability to customer contact and discussion of outstanding requirements to speed up any approvals processes (e.g. planning or building permits).
- Opportunities and greater focus/dedication to better inform and re-design the applications intake and coordination process for business licensing and planning applications, including process automation through selected software (CityWorks).

- Spillover of benefit into other service delivery as a staff member dedication to application intake and coordination would alleviate response pressures in both the planning and permitting teams;
- Avoiding burnout and supporting concepts of being an employer of choice.

Does the position fill an **Organizational Skill Gap?**

Yes. While skills and competencies exist within individuals in the organization, there is a gap in the teams' capacities to adequately deliver and coordinate responses to achieve the desired level of organizational excellence and satisfaction.

Any other **Organizational Benefits?**

Yes. Creating a dedicated position for application intake and coordination will have a spill-over benefit to other functions and processes within Community Planning and Permits teams, mainly in that time and administrative and technical resources are freed up and can be dedicated to other core requirements, improving staff well-being and generating better service delivery overall.

Expected Key Responsibilities

- Intake of planning, safety codes, business license and filming applications and associated coordination, including internal and external correspondence
- Responding to and coordinating enquiries including seeking the required specialist input in a timely manner
- Contribute to process redesign, input and testing of process automation
- Responding to customer inquiries as they relate to planning, building and business applications

Estimated Annual Cost (Base Salary)

- Band 5 – Budgeted estimate B5-6 = $90,733

Evaluation of Alternative Options

Options	Annual Costs	Pros	Cons
Moving the currently vacant Community Identity position into the Community Planning Team to add additional capacity within that team to assist with the intake and coordination of applications and enquiries.	Would likely require an additional administrator within Community Identity at ~$70,000	Would address workload pressures and an experienced resourcing shortfall at the technical level within the Community Planning Team as soon as the incoming person is trained and familiar with their role. Provides the team with confidence that the Town is working to maintain the staff's wellbeing during stressful times.	Would leave the Community Identity Team without any administrative capacity. Does not address similar issues experienced in the Permit team, which currently receives support through a team member of the customer experience/support pool (temporary).

| Using existing administrative and technical team members to provide the applications intake and coordination service: Reorganize tasks within the both the Community Planning and Permits Teams to provide a coordinated service to applications intake, coordination and enquiries. | No additional costs | No additional costs. | Staff capacity. There is a sense within both the Community Planning and Permit teams that workloads are significant, particularly where additional tasks or services have recently shifted and added (e.g. business licensing within the Community Planning group). The addition of a temporary customer service representative to the Permit Team to respond to enquiries and assist with applications intake is said to have made a considerable difference in enabling better workflows and coordination within that group.

The position assigned to work on business licensing is moving to the Community Identity team. Moving this position and its capacity into the Community Planning team would remove the administrative capacity within the Community Identity team; i.e. leave this team without an administrator and likely require a new administrative position within that group. This was discussed in the previous option.

Using existing technical or administrative staff from impacted teams would require the facilitation of cross-training of staff to be able to deliver the intake and coordination service. In addition, their concentration on what can be time-intensive tasks may remove their focus from other administrative and process oriented tasks and impact downstream service delivery. |
|---|---|---|---|

Position Risk Assessment

	Impact	Likelihood
Expected Value - Core Service	High (benefit), while requiring the training of a new staff member	High
Expected Value - Strategic Goals	High (organizational excellence; customer service and satisfaction; strong local economy (ease of doing business), being an employer of choice.	Medium
Organizational Skill Gap	High (there is no one organizationally who can fill this role immediately as it requires training)	High

Risk Rubric

	Impact	Likelihood
Expected Value - Core Service	**Low:** Minimal impact on core services. **Medium:** Moderate impact on core services. **High:** Significant impact on core services.	**Low:** Unlikely to affect core services. **Medium:** Possible impact on core services. **High:** Likely to impact core services.
Expected Value - Strategic Goals	**Low:** Little alignment with strategic goals; minimal long-term impact. **Medium:** Some alignment with strategic goals; moderate long-term impact. **High:** Strong alignment with strategic goals; major long-term impact.	**Low:** Unlikely to affect strategic goals. **Medium:** Possible impact on strategic goals. **High:** Likely to impact strategic goals.
Organizational Skill Gap	**Low:** Skill gap is negligible; current skills are sufficient. **Medium:** Moderate skill gap; some additional training or hiring needed. **High:** Significant skill gap; immediate training or hiring required.	**Low:** Unlikely to experience issues due to skill gap. **Medium:** Possible issues due to skill gap. **High:** Likely to experience issues due to skill gap.