

	<b>Program and Service Review</b>	
	<b>Policy Type:</b>	Governance Process
	<b>Number:</b>	GP-E-2.1
	<b>To be Reviewed:</b>	Once per term
	<b>Approval Date:</b>	May 27, 2024
	<b>Motion Number:</b>	<div>24.C.175</div> <div>24.C.193</div> <div>24.C.218</div> <div>24.C.248</div> <div>24.C.269</div> <div>24.C.289</div> <div>24.C.407</div> <div>24.C.412</div> <div>25.C.161</div>
	<b>Revised Date(s):</b>	<div>June 10, 2024 (Appendix A)</div> <div>June 24, 2024 (Appendix A)</div> <div>July 15, 2024 (Appendix A)</div> <div>August 19, 2024 (Appendix A)</div> <div>September 9, 2024 (Appendix A)</div> <div>December 9, 2024 (Appendix A)</div> <div>April 28, 2025 (Appendix A)</div>

## Policy Statement

Under the *Municipal Government Act* one of the purposes of a municipality is “to provide services, facilities, or other things that, in the opinion of council, are necessary or desirable for all or a part of the municipality”. Service reviews are a regular and important part of Council’s role.

This policy sets out the framework for the ongoing review of Town of Okotoks (Town) programs, services, and associated service levels to respond to community needs and optimize program and service efficiencies.

External programs, sServices, and service levels are documented in Appendix A – **Serving the Community - External Services** and Service Level Inventory., ~~which forms of this policy.~~ Internal programs and services are documented in Appendix B - **Managing the Organization - Internal Service Inventory**.

## 1. Definitions

- 1.1. Continuous improvement - the process of systematically analyzing and reducing redundancies, raising productivity, and adjusting practices to complement the changing organizational environment (needs of citizens and partners).
- 1.2. Program – refers to a collection of services that contribute to achievement of shared outcomes. Programs are external or (citizen/community) facing **or internal (employee/organization) facing**.
- 1.3. Review - an assessment of programs and services to evaluate the adequacy of resources, processes, and systems and the service offered by the Town for our citizens and partners. A review will vary depending on the type of program or service and findings of a review may inform strategic planning, budgeting decisions, policy changes, and/or service

delivery changes. Reviews may utilize performance data and where comparable data exists, may include benchmarking.

Program and service reviews may include formally establishing service levels or existing services to ensure that Appendix A continues to evolve.

- 1.4. Service - the provision of specific outputs for external delivery that address the needs of clients (citizens, businesses, employees, ~~partners~~, etc.) and/or identified program goals. Services may be delivered to either external (citizen/community) or internal (employee/organization).
- 1.5. Service level - the expected level of performance of a service to be delivered. It is a statement that tells clients (citizens/partners, etc.) what level (usually in measurable terms) of service they are receiving. It is a service promise to clients.
- 1.6. Service standard - the defined quality of service that a service user may expect. This quality of service may be defined by a recognized external organization.
- 1.7. Services and Service Levels Inventory - the Council approved document that contains an inventory of services delivered by the Town in Appendix A and B and documents the associated service levels as contained in Appendix A.
- 1.8. Sub-Program - further specializes the target group to provide more clarity around the program and who may need to be engaged on specific topics.
- 1.9. Sub-Service - further specializes the target group to provide more clarity around the service and who may need to be engaged on specific topics.

## **2. Responsibilities**

Council shall:

- 2.1. Approve services and service levels as contained in Appendix A.
- 2.2. Review annually Appendix A and identify priorities for review of external programs, services, and/or service levels by resolution at a time appropriate for inclusion into the business planning and budget processes.
- 2.3. Provide sufficient resources to support all Council approved reviews and service level changes.

The Chief Administrative Officer shall:

- 2.4. Approve services and service levels as contained in Appendix B.
- 2.5. Foster a culture of continuous improvement within the Town and initiate the review of external programs/services to continually improve service delivery.

- 2.6. Assist Council in determining reviews of Appendix A and maintain a schedule in alignment with the approved budgeting cycle. This schedule will be used to inform the annual presentation of any proposed external program and/or service reviews to Council during the regular budget priority setting meeting/check-in. **Timing for reviews requiring approval of, or requests for additional resources are preferred to align with the business planning and budget process so, if resources are approved, a review can take place the following year.**
- 2.7. **Determine review on internal programs and services provided in Appendix B and maintain a schedule in alignment with the approved budgeting cycle. This schedule will be used to inform the annual presentation of any proposed internal program and/or service reviews to Council during the regular budget priority setting meeting/check-in.**
- 2.8. Ensure that when deemed appropriate citizens, **interested parties, partners,** and Administration have opportunities to provide input during the review process.
- 2.9. Identify resources required to implement recommendations based on review findings if within Administration's existing capacity or resources. When required, prepare a budget request for Council's consideration during the Town's regular budget process meeting if a Council approved review exceeds Administration's existing capacity or resources.
- 2.10. Present an updated Appendix A **and B** to Council for consideration and approval annually and is amended to include service and service level changes enacted by Council as required.
- 2.11. Provide updates on the progress and/or outcomes of reviews to Council. **Updates on the progress and/or outcomes of reviews shall be provided to Council either through a final report following the review or through a corporate biannual progress report.**

Appendix A - **Serving the Community - External** Service and Service Level Inventory – **May 12, 2025**

Services	Description	Sub-Services	Description	Level of Service
Programs				
A. Community Life				
Sub - Programs				
A.2 User Experience				
A.2.1 Client Services	Provision of assistance, advice, resources and transactional support to users of municipal services.	A.2.1.n Utility Account Management	Management of utility accounts for water, wastewater, stormwater and solid waste (garbage, organics and recycling).	<p>Utility accounts are set up with confirmed notification of change.</p> <p>Accounts are set up and closed within five business days. Service is provided in-person, by phone and online.</p> <p>Bills are processed and issued bi-monthly (every two months). Paper and electronic options are available.</p> <p>When closing accounts, final bills are processed pending completed Property Change of Ownership form or Land Title.</p> <p>Payment must be received by the Town on or before the payment due date to avoid late fees.</p> <p>Pay Utilities:</p> <p>Payments are collected through pre-authorized withdrawals, or through a bank or credit union.</p> <p>By cheque, money through the mail or in our 24-Hour Drop Off Box at the Municipal Centre.</p> <p>By debit card at the Municipal Centre as per hours below Utilities cannot be paid by credit card or e-transfer.</p> <p>Payment must be received by the Town on or before the payment due date to avoid late fees, and transfers to property tax accounts.</p>

Services	Description	Sub-Services	Description	Level of Service
		<b>A.2.1.o Tax Payment and Collections</b>	Provide access to payment systems and conduct collections for tax accounts.	<p>Tax Installment Payment Plan (TIPP) accounts are administered semi-monthly, on an as-required basis.</p> <p>Pay taxes: Monthly by automatic bank withdrawals or post-dated cheques using TIPP. By cheque, money through the mail or in our 24-Hour Drop Off Box at the Municipal Centre. By debit card at the Municipal Centre as per hours below or through a bank or credit union. Taxes cannot be paid by credit card or e-transfer. Payment must be received by the Town on or before the payment due date to avoid late fees.</p>
		<b>A.2.1.p Accounts Payable</b>	Provision of accurate, timely processing of all vendor invoices and staff expense claims while ensuring policies and procedures are followed.	<p>Acknowledge response to vendor inquiries within two business days. Provide cheque runs once a month, Electronic Funds Transfer (EFT) runs bi-weekly.</p>

Services	Description	Sub-Services	Description	Level of Service
Sub - Programs				
B.5 Land Use Planning and Development				
<b>B.5.8 Property Administration</b>	<p>Maintain an inventory of all municipally owned buildings, land and land rights/interests.</p> <p>Create and manage occupancy agreements (e.g. land and facility space lease agreements).</p> <p>Purchase or lease of land/building or interests to provide space to Town activities including special projects, public and /or operational needs.</p> <p>Dispose of building or land holdings.</p>	N/A	N/A	<p>Monitor compliance with lease agreements as required.</p> <p>Lease agreements are reviewed as per renewal dates.</p> <p>Purchase, sales and leasing managed through a third party vendor as required.</p>
Programs				
E. Business and Financial Management				
Sub – Programs				
E.4 Financial Operations and Management				
<b>E.4.1 Utility Account Management</b>	Management of utility accounts for water, wastewater, stormwater and solid waste (garbage, organics and recycling).	<b>E.4.1.a Utility Account Set up and Closure</b>	Management of set up and closure of utility accounts.	<p>Utility accounts are set up with confirmed notification of change.</p> <p>Accounts are set up and closed within five business days. Service is provided in-person, by phone and online.</p>

Services	Description	Sub-Services	Description	Level of Service
		<b>E.4.1.b Utility Customer Billing Issuance and Payment Collection</b>	Management of billing and payment of utility accounts.	<p>Bills are processed and issued every two months. Paper and electronic options are available. Payment must be received by the Town on or before the payment due date to avoid late fees, and transfers to property tax accounts.</p> <p>When closing accounts, final bills are processed upon request. Payments are collected through pre-authorized withdrawals, online, by mail and in person at the Okotoks Municipal Centre as per hours below.</p>
<b>E.4.2 Accounts Payable</b>	Provision of accurate, timely processing of all vendor invoices and staff expense claims while ensuring policies and procedures are followed.	<b>N/A</b>	<b>N/A</b>	<p>Acknowledge response to vendor inquiries within two business days.</p> <p>Provide cheque runs once a month, Electronic Funds Transfer (EFT) runs bi-weekly.</p>
<b>E.4.3 Procurement</b>	Acquisition of goods and/or services, including the development and execution of contracts and managing the competitive bid process.	<b>E.4.3.a Procurement – Contracts</b>	Offering support to the Corporation in terms of the acquisition of goods and/or services, including the development and execution of contracts and managing the competitive bid process.	<p>Ensure the integrity of the competitive bid process through process control, transparency and competition in compliance with relevant Trade Agreements.</p>
<b>Sub – Programs</b>				
<b>E.6 Municipal Assessment and Taxation</b>				
<b>E.6.1 Property Assessment</b>	The delivery of accurate and equitable property assessments that are essential for the distribution of the annual tax levy.	<b>E.6.1.a Assessment Notice Roll Development</b>	Development of the annual assessment and taxation roll used internally for forecasting purposes and for the preparation of the annual tax levy process as per the Municipal Government Act requirements.	<p>Completed by February 28th of the year following the valuation year. Annual tax roll is completed by June 1st of the year in which the taxes are imposed.</p> <p>Ensure compliance in the provision of assessment values to the general public, the Town, and legislative bodies as per requirements of the Municipal Government Act and all associated regulations, guidelines and Ministerial orders.</p>

Services	Description	Sub-Services	Description	Level of Service
		<b>E.6.1.b Assessment Inquiries</b>	Response to assessment inquiries: 60 days after Combined Assessment and Tax Notices are mailed, property owners can review and appeal the assessed value.	Compliance with Municipal Government Act and all associated regulations, guidelines and Ministerial orders.
		<b>E.6.1.c Maintenance of the Assessment Roll</b>	Re-inspection of existing property to help maintain accurate and up-to-date property data. This includes a Request for Information mail-out and updating building permit data.	Re-inspection of all improved residential properties is done within provincial audit standards. Permits are responded to on a quarterly basis, with all new construction permits reviewed prior to Dec 31st of the current year.
<b>E.6.2 Tax Account Management</b>	Administration of the annual and supplementary tax levy, pre-authorized payment system, school support declarations, property tax collection process and land title changes.	<b>E.6.2.a Annual and Supplemental Tax Levy Administration</b>	Collection of levies from property owners. Includes administration of property tax billing, school support declarations.	Property Tax Notices are issued as per the Municipal Government Act by May 30th of each year.
		<b>E.6.2.b Annual Property Tax Levy</b>	Prepare tax rates for review and approval by Council. The municipal property tax rates are set by Council annually through the Okotoks Property and Supplemental Tax Rates Bylaw.	Okotoks Property and Supplemental Tax Rates Bylaw updated annually. Compliance with the Municipal Government Act.
		<b>E.6.2.c Climate Energy Improvement Projects (CEIP) Tax Levy</b>	Prepare tax rates for climate energy improvement projects (CEIP).	Added to the Property Tax Notice, provided by May 30th of each year.



Services	Description	Sub-Services	Description	Level of Service
		<b>E.6.2.d Tax Payment and Collections</b>	Provide access to payment systems and conduct collections for tax accounts.	<del>Tax Installment Payment Plan (TIPP) accounts are administered semi-monthly, on an as-required basis.</del>  <del>Pay taxes:</del> <del>Monthly by automatic bank withdrawals or post-dated cheques using TIPP.</del> <del>By cheque, money through the mail or in our 24-Hour Drop Off Box at the Municipal Centre.</del> <del>By debit card at the Municipal Centre as per hours below or through a bank or credit union.</del> <del>Taxes cannot be paid by credit card or e-transfer. Payment must be received by the Town on or before the payment due date to avoid late fees.</del>
		<b>E.6.2.e Registered Land Title Updates</b>	Bi-monthly updates from the Province to the Town for property owner title changes.	Process on the 2nd and 16th of each month.
Sub - Programs				
E.7 Communications				
<b>E.7.2 Brand Management</b>	Oversee and preserve integrity of the brand internally and externally (logo, typeface, messaging and tone). Application includes advertising, printed and digital materials, signage, and social media to ensure the brand is consistently applied and protected.	N/A	N/A	<del>Requests for usage of the Town of Okotoks logo by a third party will be reviewed to meet Okotoks Brand Style Guide.</del>

Services	Description	Sub-Services	Description	Level of Service
<b>E.7.3 Digital Communications and Publications</b>	<del>Develop, advise, and oversee standards for corporate external and internal websites, electronic communications, including advertisements and social media presence. Develop and maintain digital assets such as video and images. Develop and maintain content on Websites.</del>	<del>N/A</del>	<del>N/A</del>	<del>The Town's internal and external websites are available 24/7/365 outside of regular scheduled maintenance.</del>
<b>E.7.4 Special Communication Events</b>	<del>Provide planning, support and implementation of special communication events such as park and facility renaming and funding announcements.</del>	<del>N/A</del>	<del>N/A</del>	<del>Communication of event within two weeks' notice where possible.</del>

Town Facility Operating Hours

Okotoks Eco Centre

Tuesday to Saturday 9:00am - 5:00pm

Okotoks Recreation Centre

Monday to Friday 5:30 a.m. – 10:00 p.m.  
Saturday 5:30 a.m. – 10:00 p.m.  
Sunday 8:00 a.m. – 6:00 p.m.

Please see [www.activeokotoks.ca](http://www.activeokotoks.ca) for daily schedules

Okotoks Family Resource Centre

Monday – Friday  
9:00 am - 12:00 p.m., 1p.m. - 4:00p.m. closed holidays

Okotoks Museum and Archives

Monday – Saturday 10:00 am - 5:00 pm

Okotoks Arts Gallery

Monday - Saturday 10:00 am - 5:00 pm

Okotoks Municipal Centre

Monday - Friday  
8:30 am - 4:00p.m. closed holidays

Okotoks Southridge Centre

Monday - Friday: 8:00 am - 4:00p.m. closed holidays

Environmental Education Centre

Friday: 9:00 am - 4:00 pm and/or prebooked programs

Appendix B – Managing the Organization - Internal Service Inventory – May 12, 2025

Services	Description
Programs	
A. Community Life	
Sub – Programs	
A.1 Client Services	
A.1.10 Administrative Support Services	Support the municipality through clerical, organizational, and operational tasks that assist in the effective and efficient functioning of an organization. Includes duties such as data entry, scheduling, filing, handling correspondence, managing office supplies, and providing support to Council, executives, business centres or teams.
Programs	
B. Sustainable Okotoks	
Sub - Programs	
B.1 Environmental Protection	
B.1.3 Decommissioned Site Management	Post closure care of decommissioned sites that includes monitoring and addressing any regulatory or environmental issues that may arise. This service manages decommissioned sites such as landfills and brownfields.
Sub - Programs	
B.2 Environmental Stewardship	
B.2.2 Environmental Strategy, Planning and Policies	Support the municipality through the curation of environmental data and consultation to help inform the development of strategies, plans, and policies related to environmental stewardship.
Programs	
E. Business and Financial Management	
Sub – Programs	
E.1 Asset Management	
E.1.10 Tangible Capital Assets (TCA)	Management and stewardship of the Town's asset management program. This includes the establishment of the corporate asset management framework and the operational processes required to maintain existing assets. Additionally, asset stewards work to maintain Town assets to Town standards. All aspects of asset maintenance, risk, depreciation, and field observations are incorporated into asset management practices to ensure a consistent forecasting approach is maintained throughout the Town of Okotoks.
E.1.11 Corporate Property Administration	Manage the purchase, sale or lease of municipally owned buildings, land and land rights/interests.

Services	Description
<b>E.1.12 Municipal Fleet Management</b>	Oversee, maintain, and optimize the performance and cost-efficiency of the municipality's vehicle and equipment fleet. This includes administrative, operational, and technical services that ensure municipal fleet assets are safe, reliable, compliant, and cost-effective throughout their lifecycle from acquisition to retirement.
<b>E.1.13 Technology Lifecycle Management</b>	Oversee, maintain, and optimize the performance and cost-efficiency of the municipality's information technology infrastructure and telecommunications, including servers, networks, and cloud services. This includes administrative, operational, and technical services to ensure municipal technology assets are safe, reliable, compliant, and cost-effective throughout their lifecycle from acquisition to retirement while planning for future growth and technological advancements.
Sub – Programs	
E.3 Strategic and Business Planning	
<b>E.3.3 Business Planning and Organizational Performance</b>	Support the municipality in achieving its strategic priorities and operations through integrated planning and performance measurement that keeps services aligned, efficient, and continuously improving. This enables data-driven decisions, long-term sustainability, and a culture of innovation and excellence.
<b>E.3.4 Technology Strategy and Planning</b>	Align digital infrastructure and IT investments with community goals, regulatory requirements, and emerging technology trends. The service ensures that municipal leaders are equipped with actionable strategies to modernize services, enhance cybersecurity, and drive innovation—all while remaining fiscally responsible and citizen-focused.
<b>E.3.5 Corporate Leadership</b>	<p>Provision of strategic leadership and oversight to staff.</p> <p>Administrative liaise with other orders of government, other municipalities, and municipal partners to collaborate on mutually beneficial solutions.</p> <p>Assist Council in fulfilling legislative responsibilities and duties by providing management and professional advice and decision-making options to elected officials in the establishment of strategic objectives, key issues, policies, programs and delivery of services.</p>
Sub – Programs	
E.4 Financial Operations and Management	
<b>E.4.3 Procurement</b>	Acquisition of goods and/or services, including the development and execution of contracts, managing the competitive bid process and life cycle of contracts with external suppliers and/or contractors
<b>E.4.4 Treasury Management</b>	Manage daily cash flow, investments, and long-term financial planning to improve the understanding of the Town's financial situation and enhance financial decision-making with a focus on sustainability to favorably influence its financial future.
<b>E.4.5 Government Grant Management</b>	Support the municipality by managing applications and reporting for Town grants from provincial and federal funding sources.

Services	Description
<b>E.4.6 Year End and Audit</b>	Conduct year end activities and work through a financial audit with a third party.
<b>E.4.7 Risk Management</b>	Provide support to the Corporation through risk management including the management of insurance policies and claims.
<b>E.4.8 Corporate Budget Planning and Consolidation</b>	Develop transparent, strategic, and legislatively compliant budgets that align financial planning with municipal priorities, long-term asset management goals, and accountability to citizens and council.
Sub – Programs E.6 Municipal Assessment and Taxation	
<b>E.6.1 Property Assessment</b>	Delivery of accurate and equitable property assessments that are essential for the distribution of the annual tax levy.
<b>E.6.2 Tax Account Management</b>	Administration of the annual and supplementary tax levy, pre-authorized payment system, school support declarations, property tax collection process and land title changes.
Sub – Programs E.7 Communications	
<b>E.7.2 Brand Management</b>	Oversee and preserve integrity of the brand internally and externally (logo, typeface, messaging and tone). Application includes advertising, printed and digital materials, signage, and social media to ensure the brand is consistently applied and protected.
<b>E.7.3 Digital Communications and Publications</b>	Develop, advise, and oversee standards for corporate external and internal websites, electronic communications, including advertisements and social media presence. Develop and maintain digital assets such as video and images and website content.
<b>E.7.4 Special Communication Events</b>	Provide planning, support and implementation of special communication events such as park and facility renaming and funding announcements.
<b>E.7.5 Internal Communications</b>	Provide access to relevant and timely information for employees to promote workplace culture and engagement.
<b>E.7.6 Strategic Communications Planning and Consulting</b>	Work with business centre representatives to develop strategies and plans for sharing information.
<b>E.7.7 Issue Communications</b>	Distribution of information in response to emergent municipal communication needs.
Sub – Programs E.8 Positive Employee Experience	

Services	Description
<b>E.8.1 Human Resources Supports</b>	Develop employees and foster a positive, fair, and engaged workplace through hiring, training, compensation, benefits, employee learning and development, labour relations, organizational effectiveness support, and wellness programs.
<b>E.8.2 Workplace Health and Safety</b>	Promote awareness and understanding of legislation, education of staff, opportunities for enhancement and a proactive approach to mental and psychological well-being.
Sub – Programs	
E.9 Technology and Data	
<b>E.9.1 Technology Business Solution Delivery</b>	Work with business centres to plan and implement and support business solutions to meet the needs of the organization.
<b>E.9.2 Information and Data Management</b>	Establish clear data governance, standards, and records management practices to support effective decision-making, legislative compliance, digital transformation, and public transparency. It ensures that municipal data is organized, secure, accessible, and aligned with provincial and federal regulations.
<b>E.9.3 Information Analysis and Innovation</b>	Empower municipal operations through the strategic use of data and innovative technology. This service enables evidence-based, data-driven decision making while fostering a culture of innovation that drives operational excellence and supports long-term strategic planning.
<b>E.9.4 Geographic Information System (GIS)</b>	Develop, manage and utilize the Town's geographic data and technologies, including drones, to capture, store, analyze and visualize spatial data to support planning, decision making and service delivery. Example uses include land use planning, emergency management and infrastructure management.
<b>E.9.5 IT Security and Compliance</b>	Protect Town systems, networks and data from security threats. This includes activities such as risk assessment, implementing security controls and measures, managing access and identities, conducting security audits and assessments, incident response, and maintaining awareness of emerging threats.
Sub - Programs	
E.10 Project Management	
<b>E.10.1 Design and Construction Standards</b>	Maintain and update Okotoks General Design & Construction Specifications
<b>E.10.2 Capital Project Management</b>	Implement the Capital Plan through project management including meeting the priorities of the Town's assets. Contribute to developing asset management and long-term capital budget plans.
Programs	
F. Local and Regional Governance	
Sub - Programs	
F.1 Local Governance	

Services	Description
<b>F.1.2 Public Bylaw and Policy Development</b>	Support the municipality in the development, retention and revision of public policies, bylaws, procedures and standards to guide the delivery of public services including public access.
<b>F.1.3 Administrative Guidelines Development</b>	Support the municipality in the development, retention and revision of corporate administrative guidelines to guide the delivery of services.
<b>F.1.4 Internal Compliance and Legal Advice</b>	<p>Support the municipality by providing compliance advice and recommendations to ensure adherence to internal policies, guidelines, procedures, policies, applicable acts, legislation and regulations.</p> <p>Legal advice is sought through a third party as required.</p>