



**OFFICE OF THE CHIEF
ADMINISTRATIVE OFFICER**
Staff Report

REPORT NO: CAO-2025-05

TO: Council

SUBMITTED BY: Greg Clark, Acting CAO

PREPARED BY: Lindsay Kelly, Manager of Human Resources / Health and Safety

REVIEWED BY: Greg Clark, Acting CAO

DATE: March 3, 2025

SUBJECT: People Plan Update

RECOMMENDATION:

THAT Report CAO-2025-05 People Plan update be received for information; and,

THAT Council directs Staff to report back on corporate culture initiatives and results; and,

THAT Council directs Staff to report back in Q3 with a People Plan report and 5 year plan for Council's approval.

SUMMARY:

Council asked for an update on the Organizational Structure Review and People Plan. This report summarizes the background and context for the review, status and plans to complete the review. It provides an update on the budget and deliverables of the project.

BACKGROUND:

Council unanimously adopted the following motion at the January 27th Special Council Meeting

WHEREAS the Township of Wilmot 2022 Budget included \$65,000 for the completion of an Organizational Structure Review / People Plan;

WHEREAS the Township of Wilmot Council received a presentation from Whitesell and Company on an overview of the Organizational Structure Review and People Plan on May 16, 2022;

WHEREAS the proposed purpose of the organizational review was to assess the existing processes, practices, staffing, and organization structure to identify opportunities for improvement that will optimize service delivery and modernization opportunities while making the best use of resources;

WHEREAS the proposed purpose of the People Plan was to ensure efficiency and effectiveness in meeting current and anticipated (5-10 years) service delivery requirements and to provide for implementation of strategic priorities;

WHEREAS the overview provided to Council on May 16, 2022, outlined an anticipated completion date of September 2022;

WHEREAS the 2022-2026 term of Council, nor their predecessors have been presented the People Plan & Final Report;

WHEREAS the Township of Wilmot Council prioritizes strategic planning to meet the current and anticipated service delivery requirements while making the best use of resources;

NOW THEREFORE, BE IT RESOLVED

THAT Council directs Staff to report back to the March Committee of the Whole Meeting with more information on the status of the Organizational Structure Review and People Plan project including;

- *The most recent Council approved People Plan or Organizational Structure;*
- *A list of positions changed or approved by Council since the adoption of the above;*
- *A comprehensive update on all expenditures related to the People Plan initiative, including a breakdown of payments made and services rendered;*
- *The scope of work completed to date;*
- *A timeline for remaining deliverables; and*
- *An explanation for the delay in presenting the work to Council.*

AND FINALLY THAT Council directs Staff to report back to Council by September Committee of the Whole Meeting with a People Plan and Final Report for consideration.

REPORT:

Project Initiation

In Q1 2022, the Township initiated a People Plan to review organizational structure. The Township had seen turnover in the CAO position and there were concerns with Corporate Culture as well as the operating structure. Through an RFP process Whitesell & Company was selected in April 2022 to carry out the work. The Organizational Structure & People Plan initiated in April 2022 with Whitesell & Company. The purpose was to assess the existing processes, practices, staffing, and organization structure to identify opportunities for improvement that will optimize service delivery and modernization opportunities while making the best use of resources. In addition, it was intended to identify options and develop a *People Plan* that would ensure efficiency and effectiveness in meeting current and anticipated (5-10 years) service delivery requirements and to provide for implementation of strategic priorities.

Planned Project Schedule (2022)

- Project Launch & Situational Analysis (April to June)
- External Environment Scan (June)
- Review/Evaluation (July to August)
- People Plan & Final Report (September)

The approved budget for the project was \$65,000 (2022 Budget), the contracted tender value was \$57,255.00 plus HST.

Actual Project Timeline

Phase 1

The kickoff of the project undertook situational analysis to get a sense of the existing environment, including facility reviews, staff interviews, focus groups, CLT and Council interviews, and workshops. In addition, it undertook a culture survey as part of the initial works. In addition, an environmental scan was completed to look at corporate image, current issues, comparator municipalities and initial recommendations.

Through the situational analysis of the project, a gap within the Clerks Office as well as the need to adjust the corporate leadership structure was identified. At the time the plan was initiated, the Corporate Leadership Team was comprised of eight staff including the Chief Administrative Officer and Department Directors. These eight staff represented eight distinct operating areas of the Township. Attachment 1 for Pre-People Plan (2019) Organizational Chart.

Changes in the Clerks office were implemented in May 2022 and the following implementation was executed in October to December 2022, with Council direction received in Closed in October 2022. One of the immediate outcomes of these changes was reduction of top end management

and re-invest in front-line services and program delivery. The following core service changes were implemented at that time:

- **Corporate Leadership Realignment**
 - Reduce CLT to 4 Directors, CAO
 - Reposition roles to department tactical management focus
- **Re-organize Castle Services**
 - Transition Castle staff (Assistant Curator and support staff) programming to CS
 - Transition Heritage Planning/Heritage Committee to DS
- **Establish Community Services Department (CS) (Former Parks and Recreation)**
 - Transition Project Management for Trails/Wetlands from DS to CS
- **Establish Corporate Services Department (CorS)**
 - Transfer Legislative Services to CorS
 - Begin Manager of LS/Clerk recruitment
 - Transfer Human Resources to CAO Department
- **Rename Public Works and Engineering to Infrastructure Services**
 - Fill vacant roles – Manager of Engineer, Development Technician
- **Development Services Department**
 - Transition Heritage Planning/Heritage Committee
 - Add Heritage Planner to Jr. Planner position
- **CAO Department**
 - Hire Manager of Strategic Initiatives
 - Transfer HR to CAO
 - Contract for HR consulting services

The following principles were used to guide re-allocation of resources within the Township organizational structure:

Level	Position & Description
1. Strategy	Chief Administrative Officer - <i>Township leadership & strategy</i>
2. Senior Management	Corporate Leadership Team - <i>Departmental management & strategy</i>
3. Middle Management	Managers - <i>Departmental tactical management</i>
4. Frontline Management	Supervisors - <i>Services & Programs supervision</i>

5. Operations	Coordinators, Operators, Technicians, Specialists, Admin Assistants, etc. - <i>Service delivery & managerial support</i>
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Given the significant work involved in developing this realignment of resources, this initial work was considered Phase one of the plan, with a second phase planned to evaluate the newly aligned departments and develop long-term resource plans. The report that was brought to Council in October 2022 to obtain approval of the restructuring was considered an interim report with a final report to follow.

Phase 2

At the time of Phase 1 completion, the Municipal Election was held, and an entirely new Council was elected. In addition, there was a significant impact to internal capacity due to planned and unplanned vacancies of key senior leadership and middle management roles within the organization, transitioning Castle/Planning/Rec functions during Phase 1, recruiting and on-boarding interim and permanent leadership within Legislative Services to facilitate municipal election and post-election requirements.

Planning for Phase 2 focused on delivery of a plan to reconstruct and direct organizational resources towards more sustainable, stable future, with a focus on front-line service delivery and embedded flexibility to adapt to changing circumstances through growth. Phase 1 considered only minor changes to Community Services because of an impending department leadership retirement. As such, Community Services review was delayed until Phase 2 when a new department leader had time to evaluate and propose changes.

Work was initiated in early 2023, focused on reviewing existing organization structures and developing future structures that reflected both realignment of current positions and addition of new positions to address growth and needs for improved service delivery. Attachment 2 includes samples of this work, these were proposed options, work to review and finalize was interrupted by the departure of the Director of Corporate Services during this work.

During this time a number of major projects/work demands developed due to internal and external factors; Jackson Harvest Farm OLT, Regional Land Assembly, Prime Ministers Path, Job Evaluation and Grid Review, departure of Finance Director and Manager in the middle of 2024 Budget and various other major initiatives.

Through this timeframe in 2023 and 2024, the office of the CAO also undertook an audit of HR systems and processes, and subsequently a realignment was undertaken to report through the CAO.

Phase 2 was on hold for a period as workload would not allow for project delivery, and in addition, the consultant noted project delivery challenges. In Q3 2024, Phase 2 was being re-started by CLT in hopes of internal completion of the final tasks needed to return the report to Council. This again was delayed due to resource challenges.

Currently the final delivery of a long-term people plan to Council is outstanding, work is required primarily within the Community Services and Corporate Services areas due to changes in leadership over the past 18 months.

Community Services

- The Community Services review was delayed until Phase 2, once a new department leader had time to properly evaluate personnel, structure and propose changes. With the update of the Community Services Master Plan, a joint Service Delivery review was conducted by MGA consultants. This review along with a fresh lens from the incoming Community Services Director helped establish service delivery and structural efficiencies.
- In 2023, Community Services had four distinct sections led by Managers who report directly to the Director. These included a Project Manager of Corporate Capital Projects, Manager of Parks and Facilities, Manager of Aquatics & Customer Service, and Manager of Community Services. With the retirement of the Manager of Aquatics & Customer Service in late 2023, the position was eliminated and the Aquatics branch reported directly into the Manager of Community Services providing efficiencies and synergies with recreation.
- This efficient change has streamlined reporting and industry best practices for the creation of two distinct branches, Parks/Facilities and Recreation/Culture (Community Services).
- The final development of future needs to meet growth and required service demands is still outstanding, preliminary work has started but due to the pause in Q3 2024 it was not completed.

Corporate Services

- Work on review of this department was started by the previous Director, with a preliminary future state identified in Attachment 2.
- With the onboarding of the new Director in April 2024, review of the current structure and prior work was started, however, due to the pause in Q3 2024 this work is only in its beginning stages.
- Identification of the need for additional resources was identified through the 2025 Budget process, with a request for dedicated support for both Grant Management and Revenue/Taxation Collection.

Next steps

Delivery of a final report on the People Plan to Council which includes a future needs and potential further changes to the organization structure is still outstanding. Staff plan to complete this work over the next 6 months and deliver to Council in September 2025 a final report, prior to the 2026 Budget. This report will include;

- Recommended current organizational structure, reflecting approved changes and any additional proposed changes.
- Review of resource additions over the past 5 years, demonstrating alignment with organizational priorities and goals.
- Identification of future resource needs over the next 5 years, based on growth forecasts and known service delivery demands.
- Proposal for additional actions items identified from the Culture Survey.

Additional Information

In addition to the People Plan work, changes were made in how the organization presented resourcing requests to Council. Prior to the 2020 Budget new positions were approved by Council in closed and included within the approved budget. Starting with the 2020 Budget all new positions were approved in open Council as part of budget deliberations and approval. As new positions do not relate to an identifiable individual there is no need to go into Closed session to discuss these items.

The People plan will identify potential new staffing positions, that will enable Council and Staff to plan longer term in a more sustainable manner. This does not mean that any positions identified are automatically approved by this or future Councils. Annually Council will be presented with the request for the upcoming fiscal year, which will reflect updated information to ensure the right positions are being approved at the right time, Council will then deliberate and approve those positions they support.

ALIGNMENT WITH THE TOWNSHIP OF WILMOT STRATEGIC PLAN:

Prosperous Businesses & Balanced Growth

FINANCIAL CONSIDERATIONS:

The total budget allocated for this project was \$65,000, total costs incurred to date are \$90,800.95.

\$65,536	Whitesell (\$57,255 Budget)
\$17,808	On Purpose Leadership
\$5,797	Culture AMP
\$1,659	Miscellaneous

The cost over-run related to Whitesell is largely due to unanticipated effort in Phase 1 to undertake situational analysis, gain internal alignment, and roll-out two partial restructurings in May and October 2022. In addition, with election timing and staff departures, there was additional effort required to complete project tasks.

On Purpose Leadership is an organization that was brought in to support departments during the transitions that were introduced in the summer and fall of 2022, specifically the Clerk's area and the Castle. This support helped the departments with the challenges and ensure that employees that were still with the organization were supported.

Culture AMP was the service used to undertake the organizational culture assessment; this was added to the project based on the initial findings the current state analysis. The results of the survey were compiled, and a preliminary review was completed which supported the outcomes of the first phase. Additional information can be used from this data to support next steps and future actions to improve organizational culture.

Staff do not anticipate requiring additional external support to complete the work proposed for 2025. Future actions will be identified via future budget asks if required.

ATTACHMENTS:

Attachment 1: Organization Chart (2018)

Attachment 2: DRAFT Org Chart (2023)