



Organizational & Service Level Review Final Report



Prepared By : Transitional Solutions Inc.
December 2022

Table of Contents

Letter of Transmittal	2
Executive Summary.....	3
Summary of Recommendations.....	5
Background, Engagement and Analysis	10
Organizational Structure	16
Council	24
Staff and Organization	29
Planning and Operations.....	40
Protective Services.....	49
Community Services	54
Budget and Finance	57
Conclusions & Next Steps	61
References	62
Appendices	63
Appendix A – Proposed Organizational Charts	64
Appendix B – Community Comparator Summary Table	76
Appendix C – Sample Policy – Parks and Open Space	80
Appendix D – Sample Policy – Customer Service Standards	85
Appendix E – Financial Reports	89
Appendix F – Methodology	119

Letter of Transmittal

Mayor Dahl
Town of Olds
4512 46 Street
Olds, Alberta
T4H 1R5

Re: Town of Olds Organizational and Service Review

Dear Mayor Dahl,

We are pleased to present the Town of Olds Organizational and Service Level Review Report and Recommendations.

Over the past four months, we have completed a comprehensive review and analysis of the Town of Olds as an organization, its governance, service levels and financials. As a result, we developed a series of recommendations for the Town to increase the efficiency and effectiveness of the organization, minimize risk and maximize the delivery of civic services provided to the community.

Should you have any questions or require further clarification on our recommendations, please do not hesitate to contact us or request a meeting to review the recommendations.

We feel we have captured the intent and the objectives of your original request for proposal and invite comments on the attached report.

Respectfully,

Erica Thomas
President, TSI



Executive Summary

Transitional Solutions Inc. (TSI) is pleased to present an Organizational and Service Review report for the Town of Olds. We would like to sincerely thank the Town of Olds, Council members and employees, who freely gave their time and expertise during the ongoing consultation and research phases for this Organizational and Service Review. Our discussions with the Council, Administration, and front-line employees were always candid, respectful, and productive.

The Town of Olds is a dynamic southern Alberta community of over 9500 residents living in diverse and beautiful landscapes. The Olds Regional Exhibition grounds and Olds Regional Exhibition MegaDome, along with a myriad of green spaces, parks and golf courses within close proximity, provide lots of recreational and outdoor activities. A short hop to Calgary and nestled in the shadows of the majestic Rocky Mountains, the Town is truly picturesque. An economy based on agriculture, oil & gas, tourism and higher education provides great business, employment, and active living opportunities.

The Town of Olds is also home to Olds College of Agriculture & Technology, the Olds College Broncos and the Junior A hockey team, the Olds Grizzlys. A small regional airport located just south of Town provides air service to the region. Major transportation corridors are close to Provincial Highway 2, Highway 27 which bisects the Town, and Highway 2A. Of particular note is that Olds is located on the main Canadian Pacific Railway line that connects Edmonton and Calgary. Not only does the rail line allow for the efficient movement of goods and services it is also the origin story of the Town's naming after CPR traffic manager George Olds (*The History Of Olds – Canadian History Ehx*, 2021).¹

The expectation of the organizational and service level review is that it will provide guidance and ensure that the Town is well positioned to achieve a service delivery that not only meets the community's expectations but exceeds them. With the leveraging of the cooperative nature of Town employees and strong guidance from Council, by modernizing the organization, employing best practices, implementing strong policy development and exercising sound business and financial practices, that goal is certainly achievable.

Not surprisingly, and as is usually the case with these reviews, TSI found that the Town's overall operational capacity and functioning are sufficient to provide rudimentary service in the area. Also of note is that services are being delivered by dedicated and well-intentioned employees in a fashion that meets the communities needs. However, the review uncovered areas of concern that need attention to ensure the Towns' services are relevant and delivered effectively and efficiently. Moreover, TSI identified areas of opportunity that exist in



core spaces, such as employee training and development, building relationships and improving trust, and boosting communication and program initiatives with a desire to improve services to the community.

In this report, TSI makes 78 recommendations for consideration to support optimal organizational structure and service delivery for the Town. Key recommendations are highlighted throughout the report in blue and a summary of all recommendations can be found in the following section.

Our Project Team has prepared a comprehensive report responding to the objectives, scope and deliverables required in your RFP. Through this report, TSI believes we have fulfilled our understanding of your requirements.

Summary of Recommendations

Organizational Structure

1. *That the Town of Olds implements Option A as the preferred organizational structure.*

Council

2. *That the Strategic Plan be developed to a higher level, including the specific goals of Council.*
3. *That monthly CAO conversations cease, and Council provides direction to the CAO through resolutions passed at a public Council meeting.*
4. *That the performance assessment process for the CAO is amended to remove the involvement of the Manager of Human Resources.*
5. *That Policy No. 315C and Procedure No. 315 P be updated to follow the CAMA Performance Management Toolkit.*
6. *That Councilors refrain from meeting with staff members to hear their personal complaints.*
7. *Only elected members of the Council sit at the Council table.*
8. *That Policy 101C Policy and Procedure Development be amended to state that all Council Policies be reviewed, updated and approved within each council term.*
9. *That all policies for outward service delivery have a defined level of service (similar to the Playground Inspection and Maintenance).*
10. *That Policy 105C Communication and Response be reviewed to ensure it aligns with the 2022-2032 Strategic Plan.*
11. *That Policy 126C Elected Official Professional Development be amended to include a greater focus on ongoing technical municipal government courses.*
12. *That Policies 106C Remuneration & Benefits, 125C Elected Official Budget Plan and 126C Elected Official Professional Development be reviewed to ensure continuity and potential amalgamation, and the Elected Officials Budget be posted to the website.*
13. *That Council appoints members to the Economic Development Secretariat.*

Staff & Organization

14. *That the HR Department develops an "Organization Succession Plan."*
15. *That all departments ensure they have current and accessible Standard Operating Procedures within each of their working units.*
16. *That HR should take time to reach a consensus and understanding when dealing with contentious issues with individuals, such as intimidation, bullying and harassment.*
17. *That HR has a sound and well-founded understanding and the resources needed to deal with specific issues, such as various staffing problems that occasionally require disciplinary actions.*
18. *HR Department to review its hiring and onboarding protocols and improve as needed.*

19. *HR Department to take the lead on providing each department with the training required in the hiring and onboarding process.*
20. *HR Department to ensure all staff leaving the Town's employment is provided with the opportunity for a voluntary "Exit Review".*
21. *HR to ensure that hiring departments are well informed on what they need in hiring new staff.*
22. *That all annual performance reviews include a review of the job description to ensure it still aligns with all positions within the organization.*
23. *HR to ensure that organization is adhering to the annual employee evaluation process, ensuring that all appraisals are adequately completed and on the employee's anniversary date.*
24. *That the Town completes a market analysis of their current benefits package to compete for suited and qualified candidates effectively.*
25. *Develop a "staff recognition" program rewarding good work or innovative ideas brought forward.*
26. *That responsibility for internal and external communications and engagement be managed by one employee.*
27. *That a Key Performance Indicator be developed for tracking of public inquiries.*
28. *That leadership addresses role clarity so all staff clearly understand their individual roles and responsibilities within the organization and also the roles and responsibilities of others.*
29. *To include effective communication methods within its overall culture improvement efforts that will establish a process where all employees are informed with accurate, consistent and timely messaging.*
30. *Managers of Operations and Community Services hold regular meetings with Community Services employees to address operational tasks and to share information on departmental priorities.*
31. *That opportunities for staff training and professional development across the organization be increased.*
32. *That adequate funding be provided for staff training and professional development across the organization.*
33. *That Performance Appraisals be done annually for all staff with goals and Key Performance Indicators as part of the process.*
34. *That the updated draft Records and Information Management Bylaw be presented to Council for approval, followed by the new Records and Information Management Policy.*
35. *Ensure that Town publications, business cards, emails and correspondence meet the specific requirements of the Brand Standards.*
36. *That a plan be developed that focuses on improving the Town's organization "culture."*

Planning and Operations

37. *Planning and Engineering Department to be formed under the oversight of a newly created position of Manager of the department.*
38. *Introduce a Buildings and Grounds Department under the Infrastructure Services Division that includes two sections: Open Spaces and Facilities.*
39. *Restructure the Operations Department led by a Manager to provide oversight of three individual Sections, a new Fleet Services, Public Works and Utilities.*
40. *That the Town adopt a Fleet Management Program with oversight provided by the Operations Manager.*
41. *That the Operations Department ensures that each staff member is aware of “who” within the organization is responsible for “what” and that the reporting lines are clear.*
42. *That leadership encourages cross-training approaches to be embraced within the Town’s culture.*
43. *That the Operations Department continues with its current program on correcting the Town’s water loss within its water distribution and metering systems.*
44. *That the Operations Department continues with its current I&I corrective measures plan.*
45. *That the Operations Department prepare a program that will coincide with the engineering recommendations provided within the “Town of Olds Master Drainage Plan.”*
46. *That the Town seeks an agreement with the Province’s traffic controller contractor to maintain the Town’s sole traffic controller.*
47. *Town Capital Projects are to be managed by the Planning and Engineering Department, thereby providing oversight of all Town Capital projects.*
48. *That the Operations Department continues to have regularly scheduled meetings keeping staff well informed with clear and consistent messaging.*
49. *That Managers are provided with a Delegation of Authority, and the authority is clearly understood by the Managers so that they can feel confident in carrying out their roles and responsibilities.*
50. *Operations Department to annually prequalify area contractors by requesting quotes to provide service fees or equipment rental rates.*
51. *That the Operations Department ensures that each section has the proper Standard Operating Procedures and is accessible at all times.*
52. *Operations initiate the request for approval to proceed with the pavement assessment analysis and to submit its application for funding under the Federation of Canadian Municipalities (FCM) Municipal Asset Management Program.*
53. *Operations to establish a Plan that will include a review of the Town’s Statutory and Engineering Infrastructure plans to ensure that they are current with the Municipal Development Plan dated September 2020.*
54. *That the Town commences a review process of the Off-Site Levy Bylaw #2018-49 and revises as needed.*

55. *That the Town secures the professional services needed to provide the professional support to assist with managing the Off-Site Levy program.*
56. *That the department initiates a program that includes an annual review of the Town's Minimum Design Guidelines.*
57. *The vacant Planner position is to be filled as soon as possible.*
58. *That Policy 502C Winter Road Maintenance and Administration Procedure 502P with Appendices A, B & C be amended to set more precise service level standards.*
59. *That key performance measurements are developed in areas conducive to measuring performance work outputs.*
60. *That the department adopts a Work Order System as a Key Performance Indicator (KPI) that will provide relevant information of the Operations Department activities.*
61. *The department develops, as a Key Performance Indicator, a Snow Management Program that includes data acquisition inserted every week into the Town's GIS system.*
62. *The department develops, as an annual Street Sweeping Program and as a Key Performance Indicator, to include the daily sweeping information inserted every week into the Town's GIS system.*
63. *That key performance measurements be developed for reporting on the number of roadway collisions and that this information be shared with the Operations Department and Protective Services.*

Protective Services

64. *That the Town of Olds considers adding capacity to the Fire Chief role by either:
 - a. *hiring a stand-alone Fire Chief or,*
 - b. *adding a second full-time Deputy Fire Chief.**
65. *That the Town of Olds considers increasing the full-time, stand-alone Fire Officer/Firefighter group.*
66. *That the Town of Olds considers options to reduce the number of times the Paid on Call staff are called out.*
67. *That the Town of Olds considers adopting the Olds Fire Master Plan (2019) Council Recommendation #5.*
68. *That the Town of Olds considers the continued implementation of the Olds Fire Master Plan (2019) recommendations, where practicable and appropriate as determined by Council and Administration.*
69. *That the Town of Olds considers assigning the role of DEM to a full-time Town of Olds employee.*
70. *That Policy 402C Operation of Fire Department and Policy 401C Municipal Enforcement Policy be rescinded.*

Community Services

- 71. The Family and Community Support Services Advisory Board meeting minutes should be named correctly, signed by the Board Chair and a Town supervisory staff member, and the Manager of Community Services job description be amended to reflect the correct Board name.*
- 72. That the Nu2U thrift store be closed or turned over to a non-profit organization.*
- 73. That Procedure 801P and the Town website be updated to match Policy 801C Nu2U Grant Guidelines. (This recommendation would be redundant if the preceding recommendation is implemented)*
- 74. That Policy 901C Recreational Facilities and Sports Fields be amended to include sportsplex ice availability dates.*
- 75. That an Aquatic Centre service level policy be developed.*
- 76. That the Heritage, Arts and Culture budget be determined according to specific service levels and not by ATCO Gas Franchise Fee revenues.*

Budget and Finance

- 77. That the Town of Olds considers implementing a general phase-in of incrementally increased mill rates that will provide the Town with more funding to provide services.*
- 78. That the Town of Olds considers increasing the non-residential property tax mill rate at a faster rate over the next five years, the current non-residential property tax rate is significantly lower than other peer municipalities.*

Background, Engagement and Analysis

TSI was hired in late August 2022 by the Town of Olds to review current standards, operations and infrastructure of the Town of Olds as an organization and develop a report with recommendations that consider the findings from previous reports, existing procedures, and constraints the Town may be facing.

TSI approached this project in a way that centred on principles of sustainability and responsible service provision. The purpose of the review was to assist in identifying issues, priorities and opportunities in providing services and to define the appropriate service levels for the Municipality. In addition, this review will guide Council and Administration in making decisions that best meet the needs of the Municipality and develop the framework for an effective service delivery model.

Specifically, the Municipalities intent for this project was to achieve the following results:

- Enhance alignment of operations with strategic priorities.
- Align and focus service level delivery.
- Increase overall effectiveness.
- Enhance the employee experience and culture.
- Determine if the current organizational structure meets intended outcomes and recommend any structural changes.

Achieving these outcomes will assist the Town in meeting the community's needs moving forward; additionally, these achievements will help identify the right-sized, properly structured organization, which will allow leadership to structure the organization and align services for optimum success.

This organizational and service review has been underpinned by the identified principles of aligning with the Town's Strategic Priorities.



At the project's onset, TSI engaged Administration and Council through one-on-one interviews and online surveys (Town employees). The survey questions focused mostly on qualitative information and created a baseline by which the team could begin one-on-one interviews with department heads and key staff. Once interviews were started, TSI could build a greater comprehension of potential areas for improvement and establish a baseline understanding of the staff's view of the organization and their departments. During this project, TSI had multiple meetings with the CAO and took the opportunity to meet with Councillors one-on-one. The TSI team then met with all departments, without managers present, to discuss the project and objectives. Through our engagement and analysis of internal structures, processes, policies and staff and their roles, we feel we can provide further efficiencies in the operations and opportunities for direct cost savings to the Town while maintaining or enhancing current service levels.

A document review was performed to understand the Town's current operations and its reporting and organizational structure. This review included the examination of the existing organizational structure and any current and previous processes, procedures, plans, programs, guidelines, studies, reports, budgets, bylaws and agreements in place to identify:

- Reporting structure and span of control;
- Operational practices and procedures;
- Best practices and potential gaps;
- Service levels, resourcing, planning, and delivery models;
- Public education and awareness initiatives
- Human Resources;
- Municipal Statistics;
- Mutual Aid Agreements;
- Policies / By-laws and SOP's;
- Records Management
- Training Programs and Documentation/Records;
- Financial resourcing;
- Corporate Culture Programs;
- Mutual aid arrangements; and
- OH&S practices.

Background research was also completed on legislation, regulations, guiding documents, and best practices offered through industry knowledge, experience, and insight to identify best practices and constraints in communities of similar size. Detailed information about these findings and recommendations is located in the analysis sections of each focus area.

Stakeholder Engagement

A key component to ensuring all voices were heard, and staff felt engaged in the review process was consultation with the Mayor and other members of Council, civic Administrations, key staff and stakeholders. TSI completed a two-part engagement process, including an online survey and in-person or virtual/phone interviews. There was a high level of response and very good participation in the interviews and the survey. This approach provided TSI with excellent information to guide the direction for further investigation, research and analysis.



At all times, TSI was extremely cognizant of the need to have all information shared be completely anonymous. Therefore, no specific feedback has been tied to any staff. In addition, those individuals requesting interviews were also guaranteed anonymity to protect the integrity of the data collected and help individuals feel more comfortable in sharing information about the Town's operations and their roles.

As mentioned at the project's onset, TSI engaged with Town Administration and Council through one-on-one interviews and online surveys. We received 34 responses to the surveys and conducted 32 interviews. The survey questions focused mostly on qualitative information and created a baseline by which the team could begin one-on-one interviews with key individuals. One-on-one interviews were then conducted with department heads and other leaders in the organization. These interviews helped to theme the many thoughts and ideas, identify areas of improvement, and get a baseline understanding of the overall view of their departments and the Town as an administrative body and service provider.

The TSI team also attended department level meetings to engage employees in conversation, inform them of the Organizational Review, and answer questions from front-line staff. TSI was further involved in initiating a Service Level review as part of the original organizational review undertaking.

Q3 On a scale of 1-5, how satisfied are you in your role?

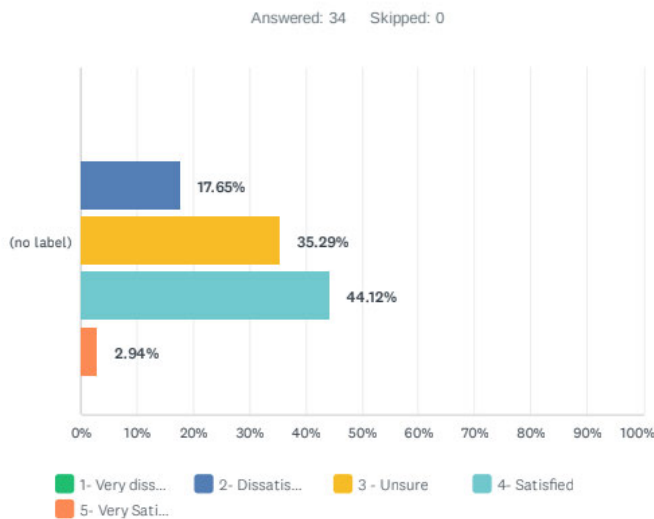


Figure 1 Employee Survey

Survey

The project started with an anonymous survey of Management, Administrative and Operational staff. The survey questions were developed to help identify perceptions of the organization and conduct a pulse check on the current state of affairs. In addition to the interviews, the survey responses helped inform the organization's strengths, weaknesses, opportunities and threats (SWOT) analysis, which is located on page 15.

Interview

Following our engagement and analysis of internal structures, processes, policies and staff, we have developed opportunities for efficiencies in the current methods to be realized as well as improvements warranted to meet the organization's future needs.

Survey and interview responses received were aggregated, and overarching themes were developed. A summary of the comments received from the surveys and interviews in relation to Organizational Structure and Service delivery are as follows:

- Morale is low, and Organizational Culture needs to be improved substantially.
- Human Resource Management needs to be improved to include recruitment, retention and recognition programs. Succession planning and increased growth and advancement opportunities are also top priorities.
- Recruitments are currently taking too long, under-resourcing is an issue, and there is a fear that staffing levels are inadequate to achieve the Council's desired outcomes or meet workload demands or expectations.
- There are too many "Silos" across the organization; which need to be eliminated.
- Some areas of the organization not only express pride in their service delivery and their role, but there is also a core of Town employees who are highly motivated, invested, engaged, and accepting of change and ready to make improvements.
- There is too much micromanagement in some areas of the organization.
- It is generally understood that there is always room for improvement. Therefore, such areas relating to internal communication, increased training, and incorporating or updating technology were identified.
- Although there are opportunities for improving internal communication, external communication efforts and community engagement are being done well; and those efforts are helping to inform and respond to residents in a way that is lifting the Town's profile.
- Desire to see, along with Strategic direction, Business Planning at multiple organizational levels combined with the Council's priorities.

- Strong leadership is needed and wanted; there is an overall feeling of a lack of support for employees. However, there is also a desire for leaders to remove barriers and promote interconnectivity and collaboration between departments.
- There are limited defined service delivery standards or expectations; therefore, standardization of Policies and Procedures to eliminate confusion and uncertainty is warranted.
- Some organizational restructuring is necessary to increase efficiency and effectiveness and improve communication and reporting relationships.
- More attention to Occupational Health & Safety codes/practices is required.
- There is a strong interest in economic development that should be leveraged.
- Generally, there is an optimistic sense that overall programs and services are being delivered in a fashion that meets citizen needs, are well received, and is valued.
- Staff are impressed with the new CAO.

Over the past four months, TSI conducted an in-depth analysis of the current organizational structure, service levels and the resources allocated to the departments regarding the operational requirements and objectives assigned. The team compared those resources, services and organizational structure to nine similarly sized municipalities around the Province, emphasizing identifying those regarded as employing best practices. Comparable municipalities where we were able to obtain organizational charts and supplementary information included:

- | | |
|--------------------------|----------------------|
| • Town of Coaldale | • Town of Innisfail |
| • Town of Drayton Valley | • City of Lacombe |
| • Town of Edson | • Town of Morinville |
| • Town of Hinton | • Town of Ponoka |
| • City of Wetaskiwin | |

A summary of our findings from this municipal comparison exercise is tabulated in Appendix B.

Through our analysis, we looked to determine the most cost-effective and strategic way to structure Town operations that are practical, achievable, and realistic to meet current and future demands. TSI recognizes that the Town administrative organizational structure includes an Executive Leadership Team consisting of four Directors, a number of Managers and the Chief Administrative Officer (CAO). Administration comprises four main divisions: Operations, Finance, Protective Services and Community Services. Under the direction of the CAO are Corporate Communications, Economic & Business Development, Legislative Services, Strategic Affairs and Human Resources.

SWOT Analysis

Informed by desk research, stakeholder consultations and analysis, TSI performed an in-depth SWOT analysis on the Municipality's departments, the management of the departments, and the programs and services they provide. During the SWOT Analysis, TSI identified several Town attributes that are working well, where improvements are needed, opportunities for success or service improvements and potential risks to the organization that could arise from inefficiencies or gaps in service delivery.

STRENGTHS

- Dedicated and hard working staff
- Many staff are ready and have indicated their willingness to move the organization forward
- Fibre Optic Project (ONet) and online readiness
- Recreation Opportunities
- Top Tier Amenities
- Support for new CAO
- Geographic Location, proximity to Rocky Mountains, Calgary and Red Deer
- Council is supportive of change
- Ability to leverage available Post-Secondary Institutions
- Employment Opportunities

WEAKNESSES

- Water distribution, excessive water loss of 30 to 40 %
- Infrastructure is aging and not in good shape
- Numerous wastewater/stormwater backups
- Lack of accountability
- Too many direct reports to the CAO
- Too many Silo's within the organization
- High staff turnover rate
- Poor internal communications
- Outdated systems and documents
- Compensation, reward and recognition
- Leadership Competencies
- Strained community relations with key individuals/groups
- Service standards are not clearly defined for all areas
- Current Strategic Plan is too high level
- Lack of Trust of the Executive Team
- Lack of clarity of goals and common direction
- Poor relationship with Council
- Training programs are not offered on a consistent and clearly communicated basis
- Little or no advancement opportunities

SWOT ANALYSIS

OPPORTUNITIES

- Tourism
- Promote the Town of Olds as an ideal location for work at home employees due to excellent fibre optics
- Corporate goal to achieve the prestigious "Employer of Choice" designation
- Hold regular staff meetings
- Sell off of ONet
- Further development of Strategic Plan up to and including a tactical work plan for the implementation of the Strategic Plan
- Create a Healthy Workplace
- Improved service delivery model
- Reset Corporate Culture and do things differently
- Improved decision-making
- Improved fiscal responsibility therefore increased value for money to citizens
- Succession Opportunity
- Economic Development
- Partnership with Olds College
- Investment in leadership and management training

THREATS

- Neighbouring municipalities recruiting Town Staff (higher wages, better working conditions, etc.)
- Significant financial constraints
- Debt limit exhausted
- Increased employee turnover
- Continued erosion of trust and employee morale
- Continuance of lack of direction, uncertainty leading to inefficiency, ineffective delivery of service
- The Director of Emergency Management is not a full time employee. And the part time person currently holding the role is getting ready to retire
- Fire Rescue is beyond its capacity to effectively respond to the increased calls for service
- Information technology is under supported and vulnerable to gaps in service, timely or slow response support or ultimate failure/outage

Organizational Structure

Analysis

As earlier highlighted in this report, TSI acknowledges that the existing Town administrative organizational structure includes an Executive Leadership Team consisting of four directors and the Chief Administrative Officer (CAO). Administration is currently structured around the four main divisions of Operations, Finance, Protective Services and Community Services. Additionally, TSI appreciates that the current responsibilities under the oversight of the CAO are Corporate Communications, Economic Development, Human Resources and Legislative & Executive support. With this lens, TSI conducted an in-depth review of the organizational structure and a deep dive into the interconnectivity of the current functional work units to look for efficiencies and possible improvements. This approach will better position the Town to deliver Council's desired services and future-proof the Town from a Triple Bottom Line perspective of economic, environmental and societal success.

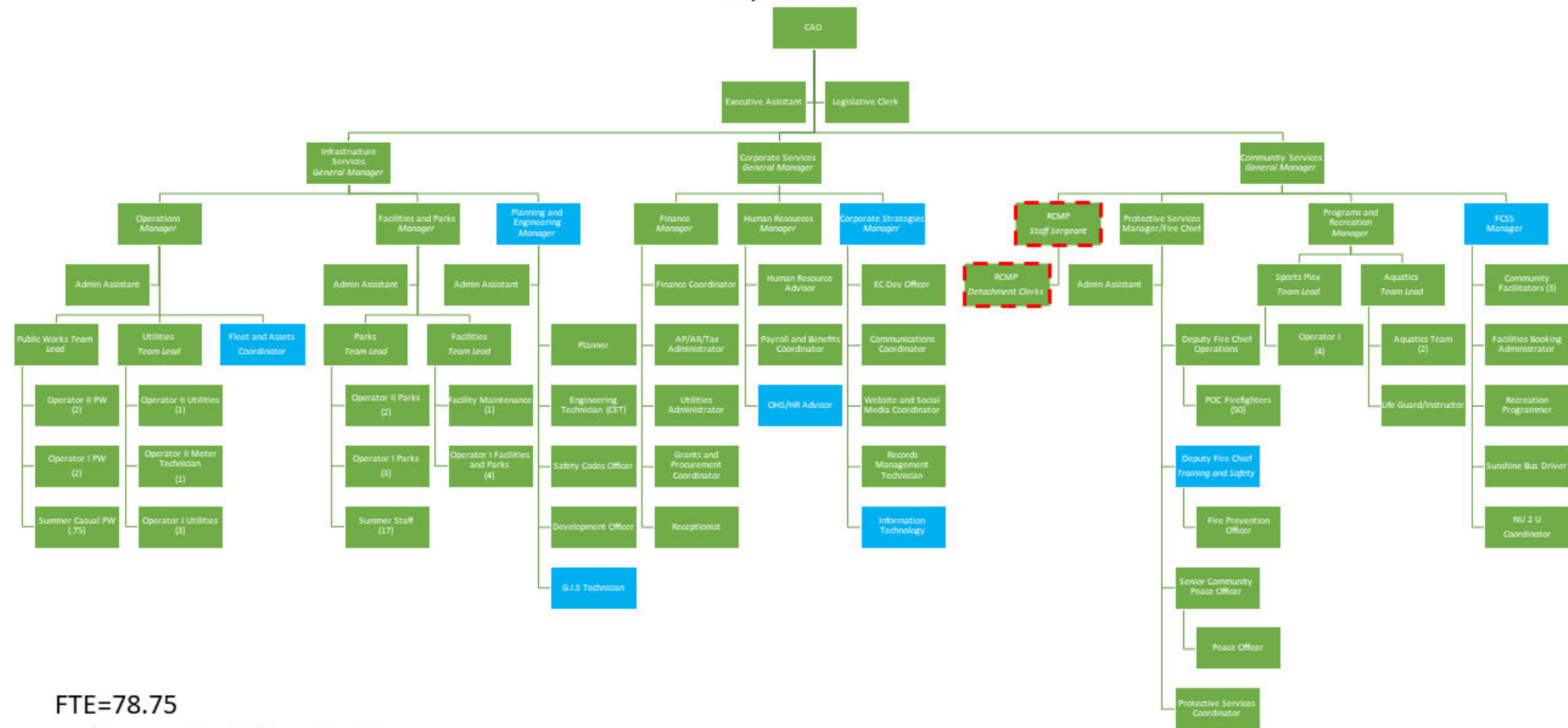
There are some significant improvements in the proposed organizational structures compared to the existing one. Most important are far fewer direct reports to the CAO, and most of those are Senior Management. As the senior leadership team, they are more focused on strategic thinking, goal implementation, mentoring, and not directing tasks of their managers; this supports the change in name from Director to General Manager. The inconsistency of the number of supervisors and managers in the divisions has been standardized, so it is primarily managers that report directly to the general managers. The hands-on managers then have team leads or front-line staff reporting to them. The Finance area has been expanded into a Corporate Services division, taking care of all the inward-facing services that support the Town. Many front-line staff currently reporting to the CAO are found in this new division.

During the analysis of the organizational structure and review of the organization, there is no question that staffing complement for the Town of Olds is under resourced in our opinion and that there needs to be some additional positions added. This will greatly improve the overall efficiency and effectiveness of the organization.

After much analysis and thoughtful consideration, TSI landed on a preferred organizational structure below. While some positions will have new titles, the job description, duties, and responsibilities will determine compensation, not the name. Organizational change can take years to implement, to minimize gaps or upheaval in the organization, and to spread out the task of hiring new staff or updating job descriptions. Alternative options that were considered, along with detailed departmental reporting structures, can be found in Appendix A.

- 1. That the Town of Olds implement Option A as the preferred organizational structure.*

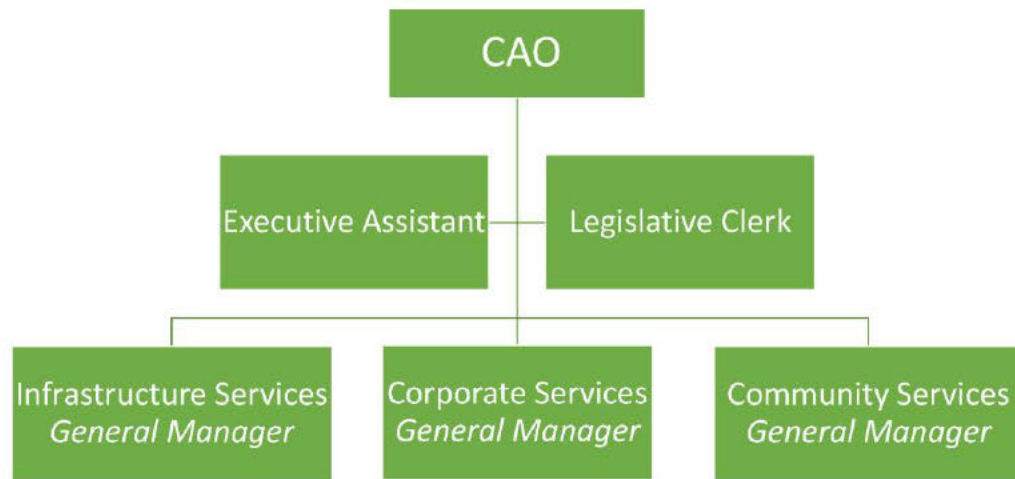
Option A



FTE=78.75



- Proposed = 5 New Positions

Executive Team



FTE = 6

Organizational Structure - Option A

	 Pros	 Cons
Senior Leadership Team (SLT)	<ul style="list-style-type: none"> ✓ Senior Leadership Team comprises the CAO and three General Managers (GM). ✓ Significant decrease in the CAO's direct reports from current ten to four (including Executive Secretary). ✓ Qualified candidates that meet the senior leadership criteria will be an incredible asset to the organization. ✓ General Managers with the proper accreditation, experience and knowledge will relieve a significant load from the CAO allowing the CAO to focus on his primary executive duties and responsibilities. 	<ul style="list-style-type: none"> ✗ [Redacted] ✗ [Redacted] ✗ [Redacted] ✗ [Redacted] ✗ [Redacted] ✗ [Redacted]
Management Team	<ul style="list-style-type: none"> ✓ Provides clarity within the Management Structure of the Organization ✓ Evenly balanced and precise representation of the Management's horizontal and vertical alignments with: <ul style="list-style-type: none"> • The CAO oversees the Town's Corporate Organizational structure through the three Divisional General Managers and the Executive Office. • Three General Managers each overseeing a Division within the corporate structure. • Three Department Managers each overseeing a department within their individual Divisions. 	<ul style="list-style-type: none"> ✗ Inevitable that any change within an organizational structure is viewed as a challenge and unacceptable to some. ✗ Efforts needed to develop an effective communication plan on rolling out any type of organizational change.

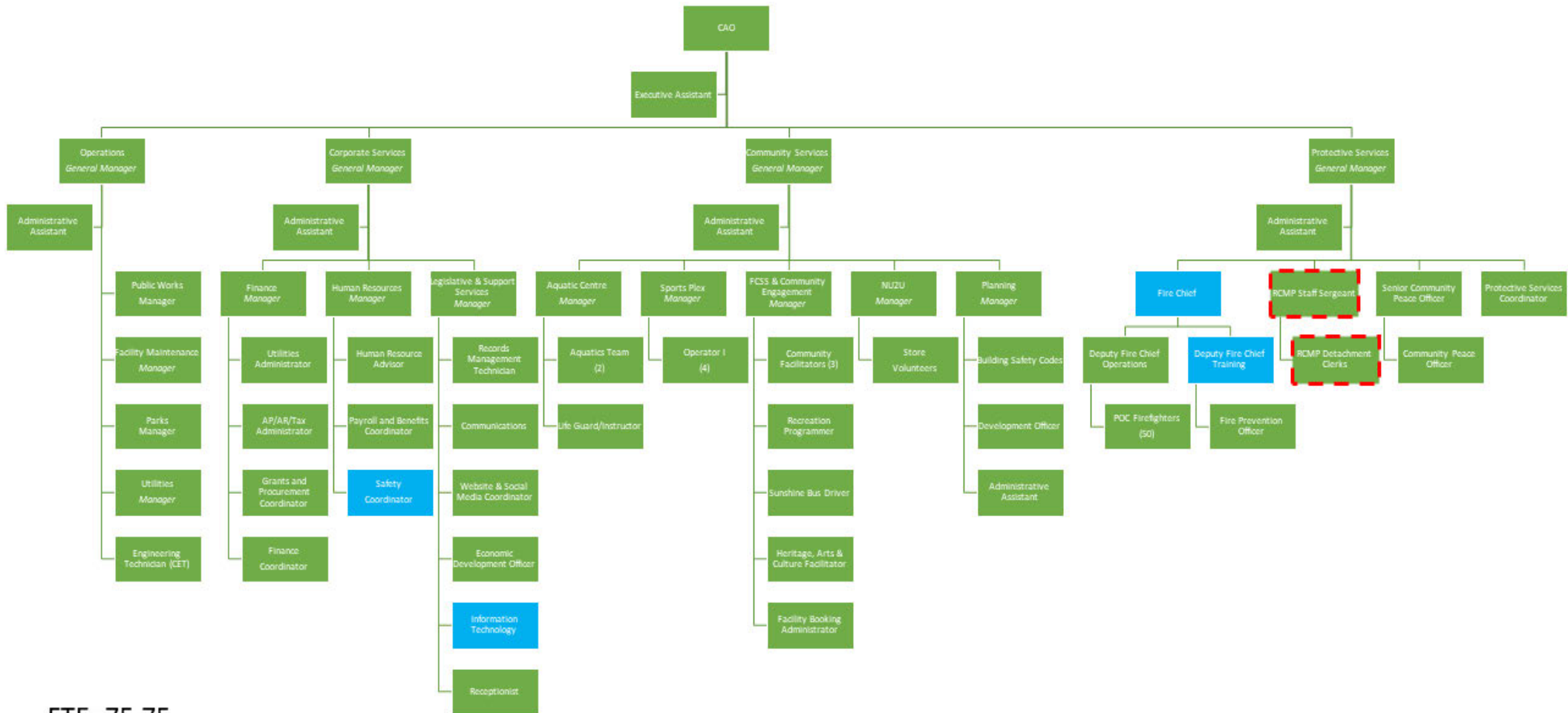
	<ul style="list-style-type: none"> • Three Infrastructure, three Corporate and three Community Services Managers for a total of nine Managers. The designation of Supervisors have been eliminated, with the next level primarily Team Leads. <ul style="list-style-type: none"> ✔ Aligns favorably with one of the major staff issues - provides clarity ✔ Establishes an improved work balance among the Management. ✔ Addresses the impression of top-heavy management by eliminating the term “Supervisor”. ✔ Provides clarity with the hierarchical nomenclature being revised to: <ul style="list-style-type: none"> • CAO - Corporation • General Manager - Divisions • Managers - Departments • Sections - Team Leads 	
Infrastructure Services	<ul style="list-style-type: none"> ✔ Consideration was taken to ensure that the positions identified are already included within the existing organizational structure. The new position (GIS Tech.) and unfunded Planner position should be labelled for budgetary consideration. ✔ A significant number of existing positions have been renamed and realigned within the proposed revised structure. ✔ The proposed structure Buildings and Grounds Manager fits within the direction that the Town has taken with the recent posting for Manager of Parks and Recreation. ✔ Fewer direct reports allow the GM to be more focussed on leadership functions within the Division providing the oversight needed of the three departments and also, supporting the CAO’s Office in his strategic and executive functions as a member of the SLT. ✔ Provides a team of technicians and specialists under one Planning & Engineering Department reporting to a Manager. ✔ Addresses role clarity on “who does what” within the Division that is currently inconsistent with an overloaded Director of Operations. ✔ Opportunity to offset costs on the new GIS Coordinator position by reducing the PCPS support costs and likely outside engineering costs needed for capital projects. 	<ul style="list-style-type: none"> ✘ Due to nomenclature change from Supervisor to Lead Hand, there may be false impression of demotion. ✘ Shifting reporting lines from Director to a Manager within the proposed Planning and Engineering Department may be construed negatively. ✘ Budgetary implications in filling the GIS Coordinator may be balanced with operational savings from the current outsourcing costs.
Corporate Services	<ul style="list-style-type: none"> ✔ All Town’s financial functions remain in one department under the Finance Manager, currently an unfounded position. ✔ HR Advisor to include an important additional safety function being the OHS/HR Advisor. 	<ul style="list-style-type: none"> ✘ [REDACTED] ✘ [REDACTED] ✘ [REDACTED] ✘ [REDACTED] ✘ Reallocation of staff may not be readily acceptable.

-
- ✔ IT moved to the newly created Department of Corporate Services.
 - ✔ The three departments provide a healthy work balance with the three individual departments led by three competent Managers.
 - ✔ The Communication functions of the community will be all managed within one of the Division's departments.
 - ✔ Economic Development could remain within the Executive Office; however, due to the interaction with many different agencies within the community and the importance of the various communication elements needed, including within the Corporate Services Department is a good fit.
-

Community Services

- | | |
|--|--|
| <ul style="list-style-type: none"> ✔ Protective Services is compressed within the Town's current Community Services Division, addressing the concern of the Fire Chief's focus with the Fire Department being diluted due to his current Director role. ✔ The critical importance is to include strong leadership within the Division and each of the three departments. ✔ The Community Services Division is set up as a public supportive and outreach system(s) through various programs and protective services. ✔ The major organizational change for the current Protective Services is it becomes an integral part of the Town's public servicing Community Services Division, with oversight of the Protective Services Division being provided by a dedicated and well experienced Manager. ✔ An additional recommendation is adding a FTE Deputy Fire Chief position that will oversee the department's Paid-on-Call (POC) staffing (50). This will also improve response capacity. | <ul style="list-style-type: none"> ✘ May have some resistance from staff on the change in reporting lines. ✘ Need qualified individuals with the proper accreditation, experience and wide breadth of knowledge to manage the proposed diverse group of professionals. ✘ The challenge will be to place strong qualified managers within the Division and each of the three departments. ✘ A challenge that Communications should be included within the Corporate Services Division however Corporate Services Division is primarily a financial and organizational supportive group. |
|--|--|

Option B



FTE=75.75



- Proposed = 4 New Positions

Executive Team



FTE = 6

Organizational Structure - Option B

	 Pros	 Cons
Senior Leadership Team (SLT)	<ul style="list-style-type: none"> ✓ Senior Management team made up of the CAO and four General Managers. ✓ Significant decrease in the CAO's direct reports from current ten to five (including Executive Assistant). ✓ General Managers with appropriate leadership skills will manage their staff at a high level and mesh well with the CAO to accomplish Council's strategic goals. ✓ Shows the Town is a modern organization with current position nomenclature. ✓ Four General Managers is similar to the current four Directors structure, meaning little upheaval within departments due to new organizational reporting structures. 	<ul style="list-style-type: none"> ✗ [Redacted] ✗ [Redacted] ✗ [Redacted] ✗ [Redacted] ✗ [Redacted] ✗ [Redacted] ✗ [Redacted]
Management Team	<ul style="list-style-type: none"> ✓ Provides clarity within the Management Structure of the Organization. ✓ Evenly balanced and clear representation of the Management's horizontal and vertical alignments. ✓ Provides clarity and consistency with staff reporting pathways. 	<ul style="list-style-type: none"> ✗ It may be challenges shifting Supervisors into a Manager focus mindset. ✗ Some staff may resist the new reporting structure.

	<ul style="list-style-type: none"> ✔ Establishes a better, more even span of control among the Managers. ✔ Addresses the impression of top-heavy management by merging the Manager and Supervisor positions. ✔ Provides clarity with the hierarchical nomenclature being revised to: <ul style="list-style-type: none"> • CAO - Corporation • General Manager - Divisions • Managers - Departments 	<ul style="list-style-type: none"> ✘ A name change from Supervisor to Manager may be perceived as promotion.
Operations Services	<ul style="list-style-type: none"> ✔ Keeps all the staff together that provide “boots on the ground” services. ✔ Four distinct departments that are complementary to each other and work out of the operations centre. ✔ Five direct reports to the General Manager. ✔ One speciality position to support engineering functions needed by the four departments. 	<ul style="list-style-type: none"> ✘ Does not include the Planning function, which often complements Public Works and Engineering. ✘ Parks services are separate from Recreation services.
Corporate Services	<ul style="list-style-type: none"> ✔ Financial functions, including grants procurement, are in one department under the Finance Manager. ✔ Human Resources to include a new position for Occupational Safety Coordinator. ✔ A new department created to consolidate Legislative Services, Communications, IT, Records Management, Economic Development and front-office Customer Service. ✔ Consolidates internal services under one General Manager. 	<ul style="list-style-type: none"> ✘ Significant changes in reporting alignments may be unacceptable to some staff.
Community Services	<ul style="list-style-type: none"> ✔ Keeps all the outward-facing customer services staff with direct public contact under one General Manager. ✔ Moves Planning Services into this area due to their significant contact with the public, interpreting and applying the land use bylaw and building permits. ✔ Move website and social media staff to Corporate Services. ✔ The same bundle keeps unique functions separate (aquatics, sportsplex, FCSS, planning). 	<ul style="list-style-type: none"> ✘ May have some resistance from staff on the change in reporting lines.
Protective Services	<ul style="list-style-type: none"> ✔ Keeps Protective Services staff, primarily Fire and Enforcement, in one division. ✔ Adds a full time Fire Chief position separate from the General Manager, so they can focus solely on Fire Services. ✔ A separate Fire Chief position allows GM to spend more time in RCMP liaison role. ✔ Recommendation is to add a FTE Deputy Fire Chief position to provide training to Paid-on-Call (POC) staffing. ✔ Deputy Chief Training could be appointed Director of Emergency Management. 	<ul style="list-style-type: none"> ✘ May have some resistance from staff on the change in reporting lines. ✘ It may be a better fit under Community Services, which would mean one less GM.

Council

What We Heard

- Council fiscal targets are clear, but service levels change based on citizen complaints.
- Council taxation levels are not in alignment with needs and wants.
- Managers need to draft policies for Council approval rather than relying on historical memories of a single resolution.
- There should be no straw votes of Council, Administration act by resolution only.
- Keep the councillor training coming; there is a lot to learn.
- There are too many councillor committees or too many councillors attending committee meetings.
- Olds needs to be competitive with taxes and fees.
- Council needs to decide the level of services.
- Measurable for comparison! (Stats need to relate to KPIs). It needs assurance that metrics can show what is getting done.
- Need good & accurate information to make the best decisions possible.
- The CAO and Director of Finance sit on either side of the Mayor in Council meetings.
- O-net takes a lot of Council time.
- Councillors should refrain from meeting with staff to discuss concerns.
- Olds is no longer a small town; it needs to think like an urban centre of 10,000+ residents. The small town handshake does not cut it anymore; things need to be written down.
- Our community is from Red Deer to Airdrie.

Analysis

A six-member Council and a Mayor govern the Town. Following the election in October 2021, Council met and developed a Strategic Plan for their four-year term, setting priorities for what they want to accomplish in that time. Then, from an operational perspective, Administration should be driven by a three-year tactical business plan based upon the strategic goals developed by Council as stated in the Strategic Plan.

Currently, the Strategic Plan is too high level. The Strategic Plan needs to be further developed beyond the four priorities to include some specific goals. The Town's leadership team would then develop a Tactical Business Plan to implement the Strategic Plan; this means that goals, priorities and task updates are all linked to the Council's Strategic Plan. The Tactical Plan then becomes the foundation for Administration to build out departmental work plans. The work plans support the budget process and are also a key component of performance management.

For example, Strategic Goal 1 discusses "communicating with our residents ." A Town Hall type of open house could be held where Council presents very brief reports to residents and invites feedback, or it could mean distributing a newsletter. Either one requires more direction to Administration on when and how often these actions should take place to accomplish the goal. Once timelines are determined, the CAO can decide who does the related tasks, when, and at what cost.

The CAO should report periodically, at least every six months, to Council on the progress of the implementation of the Strategic Plan and Tactical Work Plan; this is a good tool for Council to use in the review of the CAO's performance.

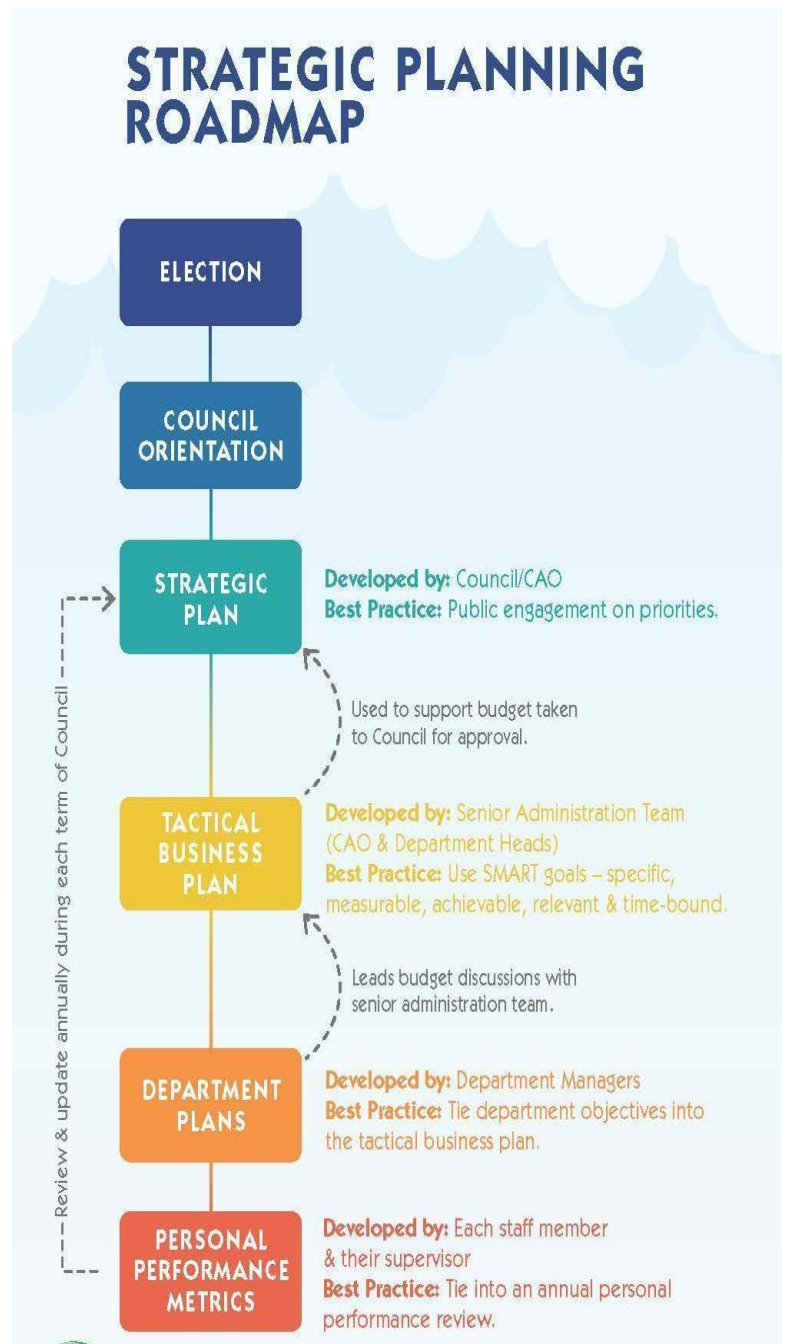
One of the challenges of being a Town Councillor is governing in public. Discussions, debates, and actions occur where the public can observe, such as in the gallery of council chambers or online. The only time the public is excluded is when the issue falls under the guidelines for going "in camera" within the Freedom of Information and Protection of Privacy Act. The CAO should only take direction from Council in the form of resolutions made at a public Council meeting. Anytime the CAO requests an action or decision, a properly researched and written Request for Decision (RFD) should be presented to Council, with good data and analysis accompanying it and three clear, unique recommendations.

Direction from Council should never be in the form of notes in the minutes, such as "consensus around the table to rescind the motion" or a "straw vote." The Council Policies and Priorities Committee is an excellent way for Council to discuss an issue in-depth and decide the priority items that need to come to a Council meeting.

2. That the Strategic Plan be developed to a higher level, including the specific goals of Council.

3. That monthly CAO conversations cease, and Council provides direction to the CAO through resolutions passed at a public Council meeting.

The Town currently has a process in place for the performance assessment of the CAO, Policy No. 315C and Procedure No. 315P. However, the current method for the performance review includes the involvement of the Manager of Human Resources. This inclusion of the HR Manager is inappropriate and needs to change. Additionally, the policy needs to be updated or rescinded. The Canadian Association of Municipal Administrators (CAMA) has a CAO Performance Management Toolkit accessible on its website. This toolkit is an excellent source of information, and using the tool itself might be a good option as well.



- 4. That the performance assessment process for the CAO is amended to remove the involvement of the Manager of Human Resources.***
- 5. That Policy No. 315C and Procedure No. 315 P be updated to follow the CAMA Performance Management Toolkit.***

On a related topic, Council knows they only have one employee. Therefore, individual Councillors should refrain from speaking to Administration directly about issues or concerns. They should also keep staff members from coming to them with their problems. When there is a concern about a staff member, Council may inform the CAO of their opinion during an in-camera portion of a Council meeting and then leave it as his responsibility.

- 6. That Councilors refrain from meeting with staff members to hear their personal complaints.***

Even though the CAO is Council's employee, they should not be sitting beside the Mayor. Generally, there should not be any members of the Administration at the Council table. When the public watches a Council meeting from the gallery or online, they should be able to clearly distinguish who the elected Councillors and the administrative staff are. Turning the nameplates to the gallery would also help. Proper procedure dictates that Administration present an agenda item (the RFD) to Council, be available to answer questions when asked, then let Council debate the topic and make a decision.

- 7. Only elected members of the Council sit at the Council table.***

Bylaws are one method that Council can use to set service levels. However, they are not flexible, written in legal language, and must be passed with three readings (resolutions). In addition, when residents or businesses do not meet the stated standards, it could lead to enforcement with subsequent penalties.

Policies are the other very effective way that Council can set service level standards in the community. They are visible to the community, typically written in plain language, cannot be enforced with penalties and can be amended with a single resolution. A review of the policies provided to TSI found that they were quite well written and current. The oldest policy was approved in January 2018; this shows that the previous Council reviewed all their policies, which is an excellent governance practice and adheres to Policy 101C, which states, "The CAO or designate(s) shall review all policies within an electoral mandate..". To make the governance practice even more robust, the current Council should update and approve every policy once the review is complete.

- 8. That Policy 101C Policy and Procedure Development be amended to state that all Council Policies be reviewed, updated and approved within each council term.***

Often complementing the Council policies are internal documents called procedures. These are administrative directions on how staff will implement a policy and are approved by the CAO. The challenge for the Council is to decide what standards to set in policy and how much flexibility to allow Administration, which will show up in procedures.

For example, Policy 902C requires a 15-metre Pesticide free zone around all playground apparatus; this is a very exacting level of service but important to a Council concerned about children's safety. The policy also differentiates green spaces into Class A, B, C and Trail Systems. However, the maintenance standard differences become vague. For example, both A and B require weekly mowing, the only

difference being mandatory or optional fertilizer use. Class C requires mowing as needed, which could be weekly, possibly similar to A and B. Policy 903C, Playground Inspection and Maintenance, is a good policy with precise service levels (24-hour response, monthly documented inspections, annual inspections to a national standard). A clear, concise policy gives good direction to the CAO, maintains consistency, and prevents reactionary changes based on citizen complaints. Neither of these policies has an accompanying Procedure, which is acceptable. A sample Policy has been provided in Appendix C for comparison purposes.

9. That all policies for outward service delivery have a defined level of service (similar to the Playground Inspection and Maintenance).

One of the Council's strategic goals is that residents actively communicate and engage with us through open dialogue; this would include emails to the Town or reporting of problems using the website. Policy 105C Communication and Response addresses some timelines for response issues and sets standards such as a three day response to an email and seven days to get Council highlights out to the public. As of now, the current Council still needs to review this policy. An example of a similar policy, Customer Service Standards, Town of Rainbow Lake, is provided for your information in Appendix D.

10. That Policy 105C Communication and Response be reviewed to ensure it aligns with the 2022-2032 Strategic Plan.

While Policy 126C Elected Official Professional Development frequently mentions conventions and conferences, there needs to be a specific mention of more technical training. For example, law firms specializing in municipal matters often have annual day-long seminars that would be good for councillors to attend. Also, the Elected Officials Education Program (EOEP) provides specific training for municipal government Councillors. Most take the first course, Muni 101, as part of their orientation soon after an election. A Municipal Elected Leaders Certificate (MELC) can be earned if all seven courses are completed. The MELC will recognize an elected leader's commitment to ongoing education and development in pursuit of high-quality service to their community.

11. That Policy 126C Elected Official Professional Development be amended to include a greater focus on ongoing technical municipal government courses.

As noted above, the Town of Olds encourages and supports the participation and attendance of councillors at annual conventions, conferences, seminars and other Professional Development during their tenure. However, in 2021, only 50% of the Council training budget of \$10,000 was spent. In 2022, there does not appear to be a line item budget for training. However, \$14,450 shows up as a budget number on the Elected Official Remuneration report on the Town website. Not having a training budget would be contrary to Policies 125C Elected Official Budget Plan & 126C Elected Official Professional Development Plan. Further, the elected official's budget plan should be posted on the Town website. It seems that these three policies are related, especially 125C & 126C.

12. That Policies 106C Remuneration & Benefits, 125C Elected Official Budget Plan and 126C Elected Official Professional Development be reviewed to ensure continuity and potential amalgamation, and the Elected Officials Budget be posted to the website.

The Economic Development Policy 1002C establishes the standing committee of the Economic Development Secretariat. While this committee was created to provide local perspective and guidance

on economic development initiatives, it also oversees ad hoc committees that develop strategies regarding economic development, tourism, business retention, investment and expansion. However, in reviewing the Organizational Meeting Minutes of 2021 and 2022, there is no mention of anyone being appointed to the committee. If Council no longer wishes to utilize this committee, it should amend the policy, disbanding it. Even though economic development does not show up in the current Strategic Plan, it is common practice for municipalities to place some emphasis on it. It is supported by two positions in the current organizational chart.

13. That Council appoints members to the Economic Development Secretariat.



Staff and Organization

This section of the report focuses on the organization and staff. First, it outlines what was learned about the people, relationships and general culture. Then, it focuses on recommendations around the people and the organizational structure that makes the most sense for the people in the organization.

Through our interviews and surveys, we heard a consistent message of the organizational culture being strained; however, all employees are dedicated to the Town and want to do their job.

A. HUMAN RESOURCE MANAGEMENT

Human Resources Management (HR) and the staff support function they provide are typically assessed by examining the general condition of the overall culture within an organization with a human resources lens perspective. Based on the high number of HR issues that have been reported, it is perceivable that addressing these issues will have a positive influence on the Town's current "troublesome" culture. During our analysis, we found the following themes and observations for consideration:

What We Heard

- The HR Department needs to take time to reach a consensus and understanding when dealing with contentious issues with individuals.
- HR should have the resources and knowledge to assist the employee and deal with the entirety of the incident.
- Need to have a solid understanding and resources to deal with time-sensitive issues such as filling vacant positions or various delicate situations such as staffing problems that occasionally require disciplinary actions.
- HR Department to ensure all staff leaving the Town's employment is provided with the opportunity for a voluntary "Exit Review."
- Lack of staff recognition of good work or innovative ideas brought forward. Staff need to feel valued and respected.
- Hiring and onboarding protocols need improvement & job descriptions need to be reviewed and revised as required.
- Department leadership needs to be well-informed and trained on the hiring process. Without the required information and understanding of hiring practices, the hiring process becomes cumbersome, complex and often frustrating.
- The Employee Evaluation process needs to be improved, with the Managers ensuring that all appraisals are completed & within a reasonable time.
- All annual performance reviews include a review of the job description to ensure it still aligns with all positions within the organization.

Analysis

The HR Department needs to "push back" occasionally when policies are not being followed. The department is sometimes seen as an impediment; however, they are simply doing its "Job." Role clarification is needed, so the organization is familiar with the HR Department's role and responsibilities.

To address high churn, turnover rates, and concerns of ill-prepared employees being moved into promotional positions they are not ready for, a succession planning system needs to be adopted to address the loss of key staff members and their replacements. This initiative, when implemented, will be seen as a positive move forward within the organizational culture sphere. The plan will need to include a

process for identifying individuals with the aptitude and interest in moving up within the organization and providing training and mentorship opportunities to them.

14. That the HR Department develops an "Organization Succession Plan."

In addition to succession planning, the organization must have robust performance monitoring, clear and concise position descriptions and the appropriate Standard Operating Procedures (SOP) for each department and working unit's roles. Having Standard Operating Procedures that are accessible and current will significantly assist an individual in moving into a new position and understanding what is expected of them in this new role. Having a document such as the SOP's itself also has the benefit of reducing the burden associated with the organization losing expertise and historical knowledge.

15. That all departments ensure they have current and accessible Standard Operating Procedures within each of their working units.

Human Resources (HR) staff support services are typically assessed by examining the general condition of the overall culture within an organization from a human resources perspective. Based on the high number of HR issues that have been reported, it is evident that addressing these issues will have a positive effect on the Town's current "troublesome" culture. The HR Department needs to take the time to reach a consensus and understanding when dealing with contentious issues with individuals. Using as an example an employee who requires assistance when confronted with workplace or personal concerns such as intimidation, bullying and harassment, the HR Department should have the resources and knowledge to assist the employee and deal with the entirety of the incident.

16. That HR should take time to reach a consensus and understanding when dealing with contentious issues with individuals, such as intimidation, bullying and harassment.

17. That HR has a sound and well-founded understanding and the resources needed to deal with specific issues, such as various staffing problems that occasionally require disciplinary actions.

One of the HR Department's responsibilities is to provide sound leadership in the Town's hiring process. From TSI's review, there is an apparent disconnect and lack of understanding in the hiring process. Unfortunately, this is creating confusion and frustration with the hiring departments. The process is taking too much time for the HR Department and Managers, adding to the organization's disappointment. The hiring process also includes an onboarding activity. This undertaking is the orientation and training of new employees. It will lead to a high level of employee engagement and typically greater staff retention rates if the onboarding process is performed correctly. The HR Department should ensure all staff leaving the Town's employment are provided with the opportunity for a voluntary "Exit Review"; this is an excellent tool for recognizing and addressing issues within the organization, such as "why are people quitting?"

18. HR Department to review its hiring and onboarding protocols and improve as needed.

19. HR Department to take the lead on providing each department with the training required in the hiring and onboarding process.

20. HR Department to ensure all staff leaving the Town's employment is provided with the opportunity for a voluntary "Exit Review."

The HR Department needs to ensure that the organization is well coached and informed on what they need when hiring new staff. Part of the hiring process includes reviewing the relevant job description and ensuring the job description accurately describes the position being filled.

21. HR to ensure that hiring departments are well informed on what they need to hire new staff.

22. That all annual performance reviews include a review of the job description to ensure it still aligns with all positions within the organization.

HR to review the current employee evaluation process as it appears from information gathered by TSI's review improvements are needed, such as ensuring that all appraisals are correctly completed & within a reasonable time. Currently, appraisals are conducted on the employee's anniversary date, making it easier to process.

23. HR to ensure that organization is adhering to the annual employee evaluation process, ensuring that all appraisals are correctly completed and on the employee's anniversary date.

There is a lack of staff recognition of good work or staff providing new and innovative ideas. It is essential for an organization to have different forms of recognition that will express the organization's appreciation of its staff. Employees have that fundamental need to feel valued, appreciated and respected. Several staff have expressed the expectation that a review of salaries in line with the job descriptions be conducted. The HR Department initiating and providing leadership in market analysis will address several of the issues that staff has presented. The market analysis will need to include a review of the current Town's benefits package compared to others so the Town can effectively compete for suited and qualified candidates. The Town aligning itself with the results from a market analysis will provide it with an improved position in attracting better qualified people for the job.

24. That the Town completes a market analysis of its current benefit package to compete for suited and qualified candidates effectively.

25. Develop a "staff recognition" program rewarding good work or innovative ideas brought forward.



B. COMMUNICATION

What We Heard

- Some staff shared that they would prefer working in a department with regular informational sessions, such as staff meetings that provide relevant information on what is occurring within the department and the organization.
- Most often the only method of internal communication is via the email messaging system.
- Knowledge sharing is essential, knowing what is occurring throughout the organization as a whole.
- Staff need to ensure the lower level staff are informing their supervisors "what is going on ." It is a need for two-way communication.

Analysis

Communication, in general, can be separated into two distinct streams or business activities. Internal communication is categorized as how we communicate internally amongst employees, departments and work areas. This type of communication is primarily relationship-based, commonly word of mouth or formalized through an internal communique. External communications involve information being shared with the public or people outside the organization. The use of brochures, news releases and websites are examples of methods used to share information.

TSI's inquiries revealed that external communication is relatively good; however, internal communication at all organizational levels has been identified as an area that needs improvement. Although effective communication within any organization is essential and needs to occur regularly, communications will be greatly enhanced by ensuring regularly scheduled meetings are held within each department, with minutes and action items being recorded and made available. It's a simple task, and staff will appreciate being informed through this engagement and transparency.

As part of an effective communication program, all formal messaging or communication must be clear, consistent, accurate and timely. All types of communication should follow these important features. Furthermore, improving the organization's communication protocols will beneficially impact the current organization's cultural issues. Therefore, improving communication should be considered an integral part of the cultural plan for improving the overall culture within the organization.

26. That responsibility for internal and external communications and engagement be managed by one employee.

The Town currently has a communications protocol that engages citizens and invites them to comment on Town services or report a non-emergency problem using the "Report a Problem (RAP)" Town portal application. This type of external communications program provides the Town with the opportunity to measure the performance of the Town's external communication programs by simply developing a Key Performance Indicator (KPI). The KPIs will calculate and provide key output metrics such as the number of complaints (weekly/monthly) received and response time per call.

27. That a Key Performance Indicator be developed for tracking public inquiries.

An essential part of the communication issue is the need to address the organization's "role clarity" and disseminate the message throughout the organization. It is necessary that staff clearly understand their roles within the organization as well as the roles of others. The lack of regular and effective communication within an organization likely leads to a lack of role clarity.

As an example, consider the following associated issues that are reflective of a lack of role clarity within the Operations Department:

- Staff not knowing whom to report to on specific tasks creates indecision, wasting of time, and, unfortunately, decisions can be unsatisfactory/substandard/incorrect,
- Staff wasting time trying to get things done or receive approval describes a lack of role clarity within the organization,
- Lack of clarity on "Who Does What" and lack of effective leadership is one of many reasons that staff are leaving the employment of the Town,
- A sense of belonging within the organization based on the individual's responsibilities is lacking.

The success or failure of an organization often depends on clearly understanding organizational goals and staff having clarity in roles and responsibilities, not only at the individual level but also at the section/team levels. Therefore having role clarity within the organization will facilitate the alignment within the team (who is responsible for what) and result in operational efficiencies and harmony within the work units/team.

28. That leadership addresses role clarity so all staff clearly understand their individual roles and responsibilities within the organization and also the roles and responsibilities of others.

29. To include effective communication methods within its overall culture improvement efforts that will establish a process where all employees are informed with accurate, consistent and timely messaging.

30. Managers of Operations and Community Services hold regular meetings with Community Services employees to address operational tasks and to share information on departmental priorities.



C. TRAINING AND DEVELOPMENT

*“Tell me and I forget, teach me and I may remember, involve me and I learn.”
– Benjamin Franklin*

What We Heard

- Training for all departments should meet each section's requirements and be shared equally and, more importantly, as needed throughout the organization.
- The training budget needs to be reinstated back to the pre-COVID period to meet the Town's needs both for staff and Council.
- Leadership should have the proper qualifications and training to effectively manage their areas of responsibility.
- Managers lack the knowledge needed to hire staff. Often it becomes time-consuming and frustrating. HR to provide training for Management on what is required in the hiring of staff and the onboarding process.
- The Town's Leadership to be provided with the training needed as senior managers and department heads.

Analysis

Employees want to know that they contribute to organizational effectiveness and efficiency. They also want to be well-trained and competent in their roles. All Town employees should be adequately trained in their job requirements and, in some specific cases, have the appropriate certifications, licences and qualifications required to meet the responsibilities of their positions. Additionally, operational budgets must include sufficient training funds to ensure staff can develop and enhance their skills, abilities and knowledge. Specified or designated funding is also required to stay abreast of the continuing technological changes or advancements and maintain their certification requirements in those areas.

As a result of the significant turnover of staff and Council members experienced in recent years, training is a crucial issue to address. Technical training is where one learns the tasks to get the job done correctly and promptly. Training is paramount to their success as new staff need to gain the necessary skills or abilities to carry out all tasks in a job description. Moreover, technology is constantly changing, and staff need to know what tools are available and how to use them.

Another training focus area is leadership development for supervisory and Management staff. Leadership skills are essential in today's organizations and must be nurtured or taught as a priority. Merely moving up the ranks does not mean an employee possesses the right skills or ability to effectively mentor and lead a group of people.

“Good leaders don't make excuses. Instead, they figure out a way to get things done.” – Jocko Willink

Training may be done online or by travel to in-person courses. The hidden cost of staff time to attend training may be obscure and must be considered. Along with this accommodations and allowances need to be made in work-product expectations. For example, if a manager is away getting training, they may not be in the Town attending to their staff or handling resident complaints. These tasks will need to be covered by someone else or re-prioritized not to add undue burden or additional stressors to the employee undertaking the training opportunity. The exact costs are registration fees, travel expenses, and any incidentals incurred. A cautionary note is Council and Administration sometimes see this as an easy target to cut from budgets to save money, control costs and keep tax increases close to zero. This approach is short-term focused and detrimental to the growth and sustainability of the organization in the long run. This trend needs to be avoided, and to gain back the skill lost through employee departures and lack of focus on training competencies needs to be reversed until the training gap is closed.

31. That opportunities for staff training and professional development across the organization be increased.

32. That adequate funding is provided for staff training and professional development across the organization.

The Human Resources Department should be involved in the approval of training to ensure fairness and value across the organization. HR staff should also be aware of different types of training and the benefits of each, leading to a balanced approach. As part of annual performance reviews, training goals could be discussed and become a Key Performance Indicator (KPI).

33. That Performance Appraisals be done annually for all staff with goals and Key Performance Indicators as part of the process.

D. RECORDS MANAGEMENT

Analysis

In October 2019, the Town received a Records Management Gap Report. The report focused on implementing an Electronic Document and Records Management Solution (EDRMS) to manage the Town's physical and electronic records and documents. It recommended updating the existing records management program to create a foundation for compliant recordkeeping practices. An updated Records and Information Management Bylaw was prepared in March of 2021 but has yet to be brought before Council. The accompanying Records and Information Management Policy has also yet to come before Council.



34. That the updated draft Records and Information Management Bylaw be presented to Council for approval, followed by the new Records and Information Management Policy.

The Town spent significant time and resources to develop a new logo and trademark brand. This visual identity provides immediate public recognition to individuals, events, and facilities formally associated with or supported by the Municipality. The comprehensive *Brand Standards Reference Guide* was created to ensure Policy 102C Brands Standards are implemented correctly. With high employee turnover in the past few years and the addition of new Councillors, Town Communications staff need to be vigilant in ensuring the visual identity is maintained consistently. During interviews with employees, it was apparent that some were still using business cards that did not meet current standards.

35. Ensure that Town publications, business cards, emails and correspondence meet the specific requirements of the Brand Standards.

E. CORPORATE CULTURE

Analysis

Results from the employee survey yielded some insight into the organization's cultural health. Almost 50% felt that the current culture is either "troublesome" or "unsupportive." From this small sample of Town employees, TSI acknowledges that corporate culture is a significant concern on employees' minds and needs to be addressed as a priority.

Q16 How would you describe your current organizational culture?

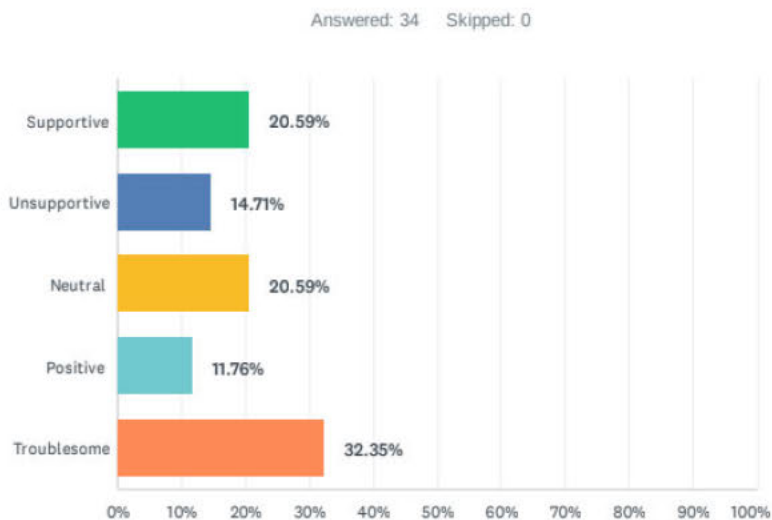


Figure 2 Employee Survey

Two significant issues did come to the surface within a pretty short order of TSI starting the review; "lack of trust" and "micromanaging."

Lack of trust is prevalent throughout the organization. It is paramount that staff's confidence within the entire organization is reinstated as quickly as possible. The Town's culture should include occasions for staff to communicate with Management and colleagues on innovative ideas and be valued for the input that they can share. The CAO and the Senior Management Team should hold regularly scheduled engagement meetings, on a suggested quarterly basis at a minimum, with individual departments. These sessions will provide staff with updates on the organization and allow staff to engage in a relaxing and non-threatening environment. Although there may be a sense of lack of trust overall, communication among workers was reported by many as being excellent.

Micromanaging within the organization was also identified as being an issue. A good practice is to have Managers engage and challenge their direct reports to ensure that the work being done should not be the Manager's to perform. This will help to clear the work assignments from the Manager's desk and

ensure the right people are doing the work required of them in their positions. This approach will also empower their staff to complete tasks productively. This practice is also cascaded by the General Manager, who should delegate and empower Managers in the same fashion. By spending less time on issues that could easily be looked after by responsible and accountable Managers, the General Manager can refocus their time on the strategic level thinking required of the position.



In addition to the two specific items previously mentioned above, the following are responses from TSI's interviews with staff, Council members and the information garnered from the staff surveys that reflect several reasons that the current culture is damaged:

- Efficiency seems to be lacking based on numerous staff comments that “Communication” and “Role Clarity” needs to be addressed and improved.
- There is a lack of adequate structure leading to a lack of clarity on "who is responsible for what?"
- There is a lack of clear direction from Management.
- The Town's survey reports that: "the organization is not well structured and reporting relationships are not efficient and effective.
- The inadequate organizational structure likely adds to poor cultural health.
- Reasons staff are leaving the organization such as lack of appreciation, lack of direction/leadership, internal communications lacking throughout the entire organization, and lack of commitment to improve/change and addressing issues.
- With staff doing its best to accomplish providing good service with limited services, the Town looks great.
- Bullying within the Town’s environment needs to be addressed.

Only some of the news being reported was negative. Interviews also uncovered numerous favourable comments demonstrating that staff strongly committed to doing a good job. The Town is also recognized as a good place to work. There is an understanding of the importance and value of the organization's primary role and responsibility in serving the public.

Survey results show that 93% of 41 staff that responded say that the Town of Olds is a good place to work, with good people that genuinely care about the Town and its coworkers. Most staff are passionate and appreciative of their employment with the Town of Olds and recognize opportunities to build a positive culture. In addition, there are opportunities to adapt to new ways of doing things, especially with the recent CAO hire, who appears to understand the need to accept new and innovative ideas.

36. That a plan is developed that focuses on improving the Town's organization "culture."

Some of the themes developed from employee comments reflect a sense that staff are under-appreciated or unappreciated, do not have the tools necessary for performing their jobs, and do not have the proper training to do their jobs confidently.

It is essential to note that the following excerpts from the current Town's Strategic Plan reflect a commitment to the value of staff. The following passages clearly describe a positive sentiment of Council's appreciation of Town staff recognizing the value they bring.

Town of Olds 2022-2032 Strategic Plan

We also want to ensure that our staff, who are critical to our collective success, feel they are contributing to our team. Through proper communication and engagement, we will collectively work towards making the Town of Olds, a community of choice.

Results: Staff feel they have contributed to our team

Although often not recognized, the behind-the-scenes work in our organization, throughour skilled public professionals and administrators are one of the greatest strengths of our community._

Results: Staff have the tools they require for operational excellence

We will promote and encourage a culture of innovation – striving for enhancements to achieve service delivery excellence so that we can continue with the standard of service that our citizens have come to expect.

So How Do We Improve Corporate Culture?

The first and most critical step is for senior leadership to develop a Plan that will include as many solutions as possible for addressing the needs required to establish a strong and healthy environment within the Town as an organization. The plan must start by introducing a commitment (an overarching goal), such as the Town's desire to become an "Employer of Choice ."Moreover, employees must be part of the planning process and implementation.

The following are key initial initiatives that can be incorporated into the overall plan.

1. Leadership to change the existing attitudes that influence the "troublesome" characteristics embedded within the organization's culture.

2. Start with reviewing the Strategic Plan and reassuring the Town's staff of their value within the organization.
3. Post the Strategic Plan's staff appreciative statements as messaging on placards throughout the organization's staff gathering areas, so it's visible and accessible at all times.
4. Improve the communication at all levels, including both directions, as in "Bottom-up & Top Down."
5. Reintroduce "Café Discussion" type sessions similar to those previously held events that seemed productive and positively affected staff morale.
6. Review and revise, as needed, all job descriptions, emphasizing clarifying roles and responsibilities.
7. Initiate a rewards and recognition program that will recognize employees' added value in innovative contributions related to the Town's 2022 - 2032 Strategic Plan: Staff contribute to a culture of innovation.
8. Managers in leadership roles need to ensure that they are effectively managing their staff, disciplining as required and ensuring that they regularly provide useful, accurate and timely information to their staff within a comfortable environment.
9. Recognizing staff for "work well done" will always be appreciated whenever the occasion presents itself.

Planning and Operations

TSI reviewed the day-to-day operations of the Town of Olds, reviewing areas where efficiencies could be found through small or significant changes in the way things are done in the various departments throughout the Town. Administration comprises four main divisions: Planning & Operations, Finance, Protective Services and Community Services. Therefore, our first area for review is Planning and Operations.

Focusing on the Operations Department, some issues noted through interviews and staff surveys have surfaced. A number of them can be addressed by simply reengineering the department, while others are more complicated and will require developing plans in order to proceed with the challenges in correcting.

What We Heard

- The Operations Department Director currently includes a total of 8 direct reports covering too many different functional areas.
- There is a common impression from staff and Council that the Parks section currently under the Operations Manager should be moved to the Community Services Department.
- The current onboarding process needs to be improved.
- Leadership training is needed for Management, including leadership education for managers.
- Department tends to deal with emerging issues in a reactive manner rather than being better prepared to deal with the challenges.
- Staff lack feeling valued and respected, being recognized for good work or presenting innovative ideas.
- Town to consider implementing a recognition for long-term employees and an employee rewards program.
- Lack of leadership and confusion of sometimes not knowing whom to report to on specific tasks. Role clarification within the organization is needed.
- Standard Operating Procedures (SOP) are lacking, and it is important that departmental SOPs are properly developed.
- Council to refer any complaints/issues that they receive from the public to Management or, if appropriate, the Town's website's "Report A Problem (RAP)" with the following link:
<https://www.olds.ca/rap>
- Bullying within the Town's environment is an issue that needs to be immediately addressed.
- Less micromanaging allows the field supervisors to efficiently coordinate their efforts to meet their unit needs without compromising budget thresholds and Town policies/procedures.

Analysis

The Operations Department is currently led by the Director of Operations and supported by the Manager of Operations. These positions provide direct oversight to the three operational departments, Utilities, Public Works and Parks Sections, which are led by three individual Supervisors. The Operations Manager position also includes oversight of the Facility Technician as a direct report, equating to four direct reports to the Manager of Operations. In addition to the Manager of Operations, the Director is also responsible for some planning, engineering, development technicians and office administrative staff

that report to the Director.

It is evident that the Operations Department's organizational structure needs to be reengineered with a number of changes, such as decreasing the Director's direct reports and realigning the sections and departments within the Operations Department.

37. Planning and Engineering Department to be formed under the oversight of a newly created position of Manager of the department.

38. Introduce a Buildings and Grounds Department under the Infrastructure Services Division that includes two sections: Open Spaces and Facilities.

39. Restructure the Operations Department led by a Manager to provide oversight of three individual Sections, a new Fleet Services, Public Works and Utilities.

The Town's Fleet Management Program is nonexistent. A Fleet Management Program is integral to the Town's overall Assets Management Program and needs to be developed. Establishing a Fleet Management program will ensure that the Town's fleet, as an asset, is well maintained and operating in the most effective and cost-efficient manner possible.

40. That the Town adopt a Fleet Management Program with oversight provided by the Operations Manager.



The Town, unfortunately, has "Silos" present within the organization and as part of its culture. The existence of "Silos" is unmistakably one of the sources of the current problems being faced throughout several departments. The "Silos" mindset has a negative and disruptive impact on the overall culture of an organization and will continue to be detrimental until addressed. The presence of "Silos" also affects the operational effectiveness and collaboration efforts between work units. One method in dealing with this type of disruption is to ensure that staff clearly understand their roles and the roles and responsibilities of others within the organization. The process of defining and communicating the roles of

employees as individuals and the roles of others within the organization is commonly referred to as "Role Clarification." By taking on this approach, the Town can eliminate confusion amongst staff and curtail the wasting of precious time from staff being able to distinguish their role within the organization, and simple facets such as "who reports to whom." When working environments support "Role Clarification" within their culture, "Silos" will not exist.

41. That the Operations Department ensures that each staff member is aware of "who" within the organization is responsible for "what" and that the reporting lines are clear.

Another method that has proven successful in addressing "Silos" is to develop a program that encourages staff to partake in taking training available in other departments. There are a variety of possibilities available within a municipal organization that allows individuals to seek cross-training opportunities. This training approach increases understanding of different areas and the employees working there. It also tends to improve relationships and lead to greater collaborations, thereby positively breaking down the existing "Silos."

42. That leadership encourages cross-training approaches to be embraced within the Town's culture.

From a more tactical perspective, the Town has a number of infrastructure concerns that need immediate attention. TSI has identified the following major system deficiencies as areas of significant concern that need to be resolved.

Water sales and purchases records show the Town is losing a significant amount of potable water (30-40%) and that the water loss has been occurring for a number of years. The good news is that the Town recently completed an engineering study on this issue and provided a report that included recommendations on how the Town should proceed with the corrective measures. Further, the Operations Department has continued the work and carried on with the engineering report's recommendations developing a program for implementing the corrective actions.

43. That the Operations Department continues with its current program on correcting the Town's water loss within its water distribution and metering systems.

The Town's consultant also identified, within the Water Loss Study report, serious issues of infiltration and inflow (I&I) within the Town's wastewater collection system that is the direct cause of some notable operational deficiencies that require immediate attention.

Typically, I&I issues are the primary cause of the following:

- a. Additional operating expenses in the treatment of inflow and infiltration as part of the wastewater treatment process.
- b. Extraneous water carried within sewer collection and unnecessarily treated has detrimental effects on the sewer collection system's "capacity."
- c. If not corrected, the results of the additional I&I flows will force costly premature infrastructure replacement.
- d. Will affect future development as the maximum sewer capacity is prematurely reached.
- e. I&I flows add unnecessary operational costs to the Town's sewer pumping (Lift station facilities) and wastewater treatment facilities.
- f. The additional I&I flows may cause a premature need to upgrade mechanical systems such as pumps and treatment facilities.

Similarly to the water loss issue, the Operations Department has taken the initiative to develop a program to proceed with the corrective measures of the Infiltration & Inflow problems.

44. That the Operations Department continue with its current I&I corrective measures plan.

The "Town of Olds Master Drainage Plan," recently completed by Urban Systems (dated Feb. 2018), is extremely detailed and adequately covers the majority of the Town's drainage issues as well as future

planned areas within the Town's boundaries. The plan includes numerous recommendations that provide the Town with guidance for existing drainage improvement needs and future development. It is critically important that the Operations Department continue gaining knowledge from the study and, most importantly, to focus on preparing a detailed plan on how the Town is to proceed with the recommendations that the "Town of Olds Master Drainage Plan" document has presented.

45. That the Operations Department prepare a program that will coincide with the engineering recommendations provided within the "Town of Olds Master Drainage Plan."

Operational Enhancements

Several operational improvements required have been identified and presented within this section that will prove successful in boosting efficiencies within the Operations Department. Further to those recommendations already proposed, the following comments offer a number of operational enhancements to be considered.

The Town's Operations Department is responsible for the operations of one traffic controller that requires special knowledge and training in adequately operating the computer/electronic/electrical driven system. To capitalize on efficiencies, the Town should consider seeking a servicing agreement with the Province's current traffic controller contractor to maintain the Town's sole traffic controller and house the program in the Public Works/Operations Department.

46. That the Town seeks an agreement with the Province's traffic controller contractor to maintain the Town's sole traffic controller.

All Capital Projects should be managed by the Planning & Engineering (P&E) Department, which can provide the necessary oversight and act as the Project Coordinator responsible for all aspects of the Town's Capital Improvement program. The P&E Department would then shoulder the responsibility to liaise with other Town departments on leading and providing oversight on most, if not all of the Town's Capital projects and assignments. The Planning & Engineering Department will also have the responsibility to have a thorough understanding and be able to interpret the contents of each of the engineering utilities and transportation plans, such as Olds/Mountain View County 2009-2035 Transportation & Utilities Master Plan and the Town's 2018 Master Drainage Plan.

47. Town Capital Projects are to be managed by the Planning and Engineering Department thereby providing oversight of all Town Capital projects.

As of late, the Operations Department has addressed the need to improve its communications protocol by having regular meetings. This includes having an agenda, meeting minutes, and developing an action list to hold everyone accountable and reinforce the role of each individual within the Operations Department. Adopting this practice has proven successful, and it's a simple act that staff appreciate.

48. That the Operations Department continues to have regularly scheduled meetings keeping staff well informed with clear and consistent messaging.

There have been occasions when operational Managers were unable to proceed with an activity due to either not having the authority to contract the work without the official approval from the Director, or the Manager had the authority needed and was not clear on their approval authority. This type of

scenario needs to be corrected for efficiency purposes and clarification of the Manager's role. By providing a clear understanding of the authorities bestowed upon them, Managers can feel confident in their decisions and the obligations they enter into. One such way to achieve this is to have Delegated Authorities on file that Managers can rely upon to verify their level of authority.

49. That Managers are provided with a Delegation of Authority, and the authority is clearly understood by the Managers so that they can feel confident in carrying out their roles and responsibilities.

50. Operations Department to annually prequalify area contractors by requesting quotes to provide service fees or equipment rental rates.

To help employees be more efficient and effective in carrying out their duties and daily tasks, the organization must have the appropriate Standard Operating Procedures (SOP) in place for each department and the working unit's roles and functions. Furthermore, as an added benefit having Standard Operating Procedures that are accessible and current will significantly assist an individual in moving into a new position.

51. That the Operations Department ensures that each section has the proper Standard Operating Procedures and is accessible at all times.



Figure 3 "Alligator Cracking"

Figure 3 shows the type of pavement deterioration that needs to be avoided. It is referred to as "Alligator Cracking" and is evidence that the pavement substructure is broken and, therefore, needs to be reconstructed at a cost that can reach as much as six times the cost of a simple pavement overlay.

There are approximately 111 kilometres of roadway within the Town of Olds, necessitating the Town to undertake a comprehensive pavement evaluation that will provide the Operations Department with the tools it needs to develop a long-term Capital Roads Program. This initiative provides the Town with a performance measurement tool by simply recognizing the annual improvements/failures by assessing the pavement quality identified on a scale of 1-100. The highest level of pavement quality achievable is 100; data collected will be tracked and reviewed annually as part of the program. The pavement management program becomes an integral part of the Town's overall Assets Management Program and can be funded under the Federation Canadian Municipalities (FCM) Municipal Assets Management Program (MAMP)

52. Operations initiate the request for approval to proceed with the pavement assessment analysis and to submit its application for funding under the Federation of Canadian Municipalities (FCM) Municipal Assets Management Program.

The Town's current Municipal Development Plan, dated September 2020, was formally adopted by Council's third reading of Bylaw No. 2020-14 on January 25, 2021. Following the official adoption of the MDP, the Operations Department must review all of the Town's engineering and planning documents to ensure that all engineering and planning documents align with the Town's Municipal Development Plan (MDP).

In reference to Section 1.0 of the Town's MDP "Relationship to other Town Plans," as follows:

"The MDP is intended to direct future land use and development at a high level. More specific plans for the development of the community are undertaken as part of the area structure plan (ASP) and area redevelopment plan (ARP) processes. ASPs and ARPs provide more detailed guidance for the development of specific properties and are expected to be consistent with the general policy guidance provided in this MDP."

In addition to ARP's and ASP's, other statutory documents that need to be reviewed are; Land Use Bylaw & Zoning, Inter-Municipal Plans and Off-Site Bylaw.

53. Operations to establish a Plan that will include a review of the Town's Statutory and Engineering Infrastructure plans to ensure that they are current with the Municipal Development Plan dated September 2020.

Furthermore, TSI identified that the Town's Operations Department is currently being challenged to manage the overall Off-Site Levy program effectively. This issue is primarily due to the lack of adequate resources, such as having a qualified planner within the department that the Director can rely on to provide critical interpretive and Management oversight of the Levy program.

The current *Off-Site Levy Bylaw #2018-49* was formally adopted by Council in November 2018. The Bylaw was based on an engineering report that was prepared in 2016. Based on the present development challenges and the recent adoption of the Town's Municipal Development Plan, a review and subsequent revision of the Bylaw is due.

54. That the Town commences a review process of the Off-Site Levy Bylaw #2018-49 and revises as needed.

55. That the Town secures the professional services needed to provide the professional support to assist with managing the Off-Site Levy program.

The Town's Minimum Design Guidelines were adopted in 2018 and are well organized and thorough, covering all aspects of the municipal type of improvements. However, the Town must recognize that changes within the overall Development Industry are inevitable; therefore, the Town needs to ensure that the guidelines are updated and kept current.

The Design Guidelines outline the technical details required to construct a project. Included are facets of information from various Town documents such as the Municipal Development Plan, Transportation Master Plan and associated transportation studies and provincial guidelines.

It is the responsibility of the Consulting Engineer to ensure the design conforms to these Guidelines and notify the Town if any alterations have been made. In some circumstances, an alternate engineering design may be required by the Town and may serve as justification for revising the Town's guidelines document. By completing an annual review process and providing Council with only the revised guidelines for formal adoption, the Design Guidelines will be kept current and incorporate the required criteria to keep up with any changes. This approach will ensure that the Town's engineering policy is, without exception, always kept up to date.

56. That the department initiates a program that includes an annual review of the Town's Minimum Design Guidelines.

The Town currently relies on Parkland Community Planning Services (PCPS) under a service agreement for the majority of the planning needs and miscellaneous planning assignments.

The Town's organizational structure chart, dated November 1, 2021, includes an "unfunded" and currently vacant Planner position. Filling the Planner's position will provide the Town with internal planning expertise within the Planning & Engineering Department. With this in-house resource, the department will be able to take on the majority of the Town's planning duties. In addition, having a Planner on staff will reduce the need for the planning support primarily provided by Parkland Community Planning Services and reduce the professional planning servicing fees. This cost savings from the reduction in professional fees could be applied as a financial offset in filling the unfunded vacant Planner position.

57. The vacant Planner position is to be filled as soon as possible.

The stated purpose of Council's Policy 502C Winter Road Maintenance is "To set out priorities for winter road maintenance...". However, it does not have any priorities or standards listed. All the standards are listed in Administrative Procedure 502P and Appendices A, B & C, which are within the purview of the CAO.

Administration should not set service levels; they should be set by Council. Administration is then responsible for defining how the tasks are to be done. A review of this policy and accompanying procedure would be an excellent exercise for Council. The benefit realized from this review would be

that Council can make an informed decision on whether they want a platinum or bronze level of service. The separation between policy and procedure can be somewhat gray, so how much of the procedure becomes policy is within the Council's realm of control.

58. That Policy 502C Winter Road Maintenance and Administration Procedure 502P with Appendices A, B & C be amended to set more precise service level standards.

Key Performance Indicators (KPI)

Key Performance Indicators are an effective type of indicator that provides public sector organizations with a measuring tool that indicates performance relative to workload, efficiencies and the effectiveness and productivity of the organization. By introducing KPIs into the Town's operating culture, the initiative will provide a tangible method for providing reports on various Town activities, holding individual departments and the organization accountable for its performance. Many of the recommendations presented in this report can be used to develop a KPI approach. The following are recommendations for initiating a KPI approach to the Operations Department culture.

59. That key performance measurements are developed in areas conducive to measuring performance work outputs.

Implementing a "Work Order System" within the Operations Department will improve the tracking of its activities related to key performance indicators, scheduling and monitoring costs. The Work Order System should include a work identification process that assists in developing new and improved service delivery methods. Within any industry segment that supports continuous improvement in the performance of activities, monitoring, measuring and tracking performance will always be an acceptable approach.

60. That the Department adopts a Work Order System as a Key Performance Indicator (KPI) that will provide relevant information of the Operations Department activities.

The Town Operations Department keeps a manual record of the roads that have been cleared of snow. That is excellent information and should be forwarded to PCPS with the information added to the Town's GIS system as a GIS winter roads maintenance layer. The data can then be manipulated to provide reports on how many kilometres of snow clearing is accomplished in a period of time; weeks, months or within a year.

The information becomes readily accessible by the department that provides the service and gives them the ability to respond to such public queries as "the Town immediately has yet to clear snow in their area." The data will also be readily available for analysis exercises to provide such information as costs per km for snow clearing. The data reporting is an excellent means of performance indicators that will be tracked annually, forming a part of the department's overall snow Management program.

61. The department develops, as a Key Performance Indicator, a Snow Management Program that includes data acquisition inserted every week into the Town's GIS system.

The Operations Department, as recommended for a Snow Management Program, has the identical advantage of developing a Street Sweeping Program performance indicator with the aid of the Town's GIS system. By reporting weekly the daily sweeping production records in lane kilometres by street &

avenues, the report will provide a measurement of work done daily, weekly and monthly.

62. The Department develops an annual Street Sweeping Program and a Key Performance Indicator, to include the daily sweeping information inserted every week into the Town's GIS system.

In relation to Fleet Management, the Operations Department would benefit by developing a performance measurement that will reflect the number of vehicular and equipment collisions. The information collected will provide a valued output comparator for the Town's traffic safety program over a pre-set period or each calendar year. In addition, the measurement could be expanded to report on the costs relative to the roadway collisions and expenses associated with each incident that could then be included as a budget performance indicator.

63. That key performance measurements be developed for reporting on the number of roadway collisions and that this information be shared with the Operations Department and Protective Services.



Protective Services

What We Heard

Focusing on the organizational structure, service levels, staffing complements and capacity, TSI reviewed all available documents, conducted several one-on-one interviews and hosted an open group meeting with representatives of all areas within Protective Services. Key documents included the Dillon Fire Services Master Plan (FSMP), Town of Olds-Mountain View County Fire Services Sub-Agreement, Town of Olds Quality Management Plan and internal Standard Operating Guidelines and reporting data. Although TSI conducted an in-depth analysis of these documents, gathering as much feedback from the Protective Services staff as possible was necessary and relevant. This helped to balance what is written with what the "on the ground" experience is.



Although a wide range of comments was collected, the overarching theme is one of pride and public service. Members of Olds Fire and Olds Municipal Enforcement expressed dedication to their services and are optimistic about the future. However, a recurring theme emerged around concerns about capacity and expectations. In point form, what we heard included the following:

Positives:

- Pride of service. The staff we talked to are happy to serve the community and are invested in the success of their respective departments.
- Dedicated people who want to serve. Good people within Fire and Municipal Enforcement. Most interviews started with comments that good people, with good intentions and abilities, work for the departments. With a few exceptions, it was made clear that the core staff complements are high-quality employees who are doing their jobs for the right reasons.
- Trust in the Fire Chief. Except for some concerns regarding his workload and visibility with the Paid on Call staff, their trust and faith in the Fire Chief were expressed as high. We consistently heard that the Fire Chief is dedicated, capable and cares about the teams.
- Excellent fire training. Many comments were received regarding the high quality of training, particularly for a municipality the size of Olds.
- Excellent trucks and equipment. Satisfaction was expressed for the quality and availability of equipment and facilities.
- Municipal Enforcement is working well. Great new staff and a fresh start.
- The relationships between the Protective Services group, the RCMP team, and the Staff Sergeant are excellent. Good comradery.

Areas of Concern:

- The Fire Chief is very busy. We don't see him as much as we would like. Several comments reflected the workload that the Director of Protective Services (Fire Chief) has, indicating that the added responsibilities of his municipal leadership role affect "facetime."
- We pretend to look like a full-time department, but we are not. Struggling with workload; too many calls.



- Too many calls that turn out to be nothing or can be handled by a small crew. Several comments were made regarding the high number of call-outs that resulted in being stood down or not even making it to the fire station.
- We will have over 400 calls this year. See a decline in Paid on Call involvement. The same ten people do 90% of the work.
 - Need another full-time operational member. Perhaps a Deputy Chief, a Captain or a Training Officer, as is mentioned in the Fire Master Plan. The need to have more full-time support and reduce the load on Paid on Call.
 - The Director of Emergency Management (DEM) is part-time and disengaged. And he is getting ready to retire.
 - Fire, in particular, feels disconnected from the Town management and structure. Comments indicated poor communication flow, not getting timely updates, feeling separate or not part of the Town employee group, not being valued or respected, and Paid on Call staff being marginalized.
 - Concern about how a few bad apples are being dealt with. Metrics on participation from Paid on Call members aren't shared. Accountability seems to be weak or, in some cases, non-existent. Issues are resolved in different ways, depending on who the person is.
 - Competitiveness between some Paid on Call Firefighters. The same ten seem to be doing most callouts. Creating disengagement and disillusionment.
 - Municipal Enforcement is sometimes overlooked. Not enough Officers to meet the requests of Council and the community.

Analysis

As a municipality and a regional centre, Olds is a growing and vibrant community. Visitation to the area is increasing, as is business and residential activity. This growth increases demands for service, both in fire response and municipal enforcement.

Based on an analysis of the Dillon Fire Services Master Plan (FSMP), Town of Olds-Mountain View County Fire Services Sub-Agreement, Town of Olds Quality Management Plan, internal Standard Operating Guidelines, the current organizational structure and Protective Services reporting data, maintaining the current service levels and delivery of that service is a challenge. Due to the year-over-year increase in calls for service in all areas, it is anticipated that the current staffing and deployment models will not be able to continue to meet the increasing demands. Furthermore, the management span of control has been reached.

A vital element of the management span of control is that the Director of Protective Services is an active, on-call Chief Fire Officer. Between this responsibility, the leadership role as a Director, managing the Municipal Enforcement group and acting as the RCMP liaison, little time is left for active and ongoing management of internal culture and team building. This is not a reflection on the person in the role but rather a description of an over-capacity organizational structure. Most of these cultural concerns can be handled by addressing the organizational structure. When reviewing any organizational structure, it is valuable to consider whether the structure would survive a change in personnel. In this case, the Director (Fire Chief) is very competent and able to support the roles and responsibilities of the Director and Fire Chief. However, if he were to leave, replacing him with someone who can meet all the current requirements and expectations would be a challenge.

Considering the available data, the size of the Municipality, industry best practices and commonly found organizational structures, the recommended option to hire a stand-alone Fire Chief position is timely and appropriate. The alternative option of hiring a second full-time deputy fire chief may act as a stop-gap measure until the organization grows and matures to a point where a stand-alone Fire Chief is absolutely required. The 2019 Dillon Fire Services Master Plan (FSMP) for the Town of Olds does not reflect the Fire Chief as the Director of Protective Services; this was a change that happened after the FSMP was published.

- 64. That the Town of Olds considers adding capacity to the Fire Chief role by either:***
- a. hiring a stand-alone Fire Chief or,***
 - b. adding a second full-time Deputy Fire Chief.***

As previously mentioned, Olds is a growing and vibrant community which continues to increase demands for service in fire response and municipal enforcement. It is anticipated that the current staffing and deployment models will not meet the demands in the future.

This analysis is validated by the Olds Fire Services Master Plan (2019). TSI has reviewed the Master Plan in detail and agrees with the body of work and the recommendations. A vital part of a service level discussion is determining the level of service the community wants. In the province of Alberta, there is not a mandated or legislated level of service required for fire and emergency response. Municipalities in Alberta attempt to balance community and firefighter safety, industry best practices, regional considerations and budgetary constraints. In this case, the Olds Fire Services Master Plan outlines the best practices, community risk assessments and actionable recommendations, which is supported by a reasonable and functional set of Olds Fire internal documents and directives.



A Paid on Call fire service in Alberta is typically considered to have one or two full-time firefighters, generally a Fire Chief and possibly a Deputy Fire Chief or two, supported by a complement of community firefighters who respond to calls for service as needed. This system is widely used in the province in smaller communities, typically under 10,000 population and is an effective and efficient way to provide fire protection for a community. However, to be sustainable several factors should be considered:

- Calls of service that involve a general page-out of firefighters should average less than one per 24-hour cycle averaged over a year.
- A well-developed fire prevention and education program needs to be in place.
- Standard Operating Guidelines and administrative directives need to be comprehensive and current.
- Training must be consistent, current and well-delivered.
- Apparatus and equipment must be appropriate, well-maintained and current.

A Composite Fire Service in Alberta can be described as a hybrid between the Paid on Call model and a Full-Time service. In the Composite model, a core of full-time firefighters is on duty 24/7. These staff members respond to calls for service that can be safely and effectively resolved with a crew of two to four members, as determined by the Town's fire administration. This core is supported by a Paid on Call complement of community firefighters. They provide an effective response force for all calls for service that require more than two to four responders. Examples may be fires, motor vehicle incidents, rescue, extraordinary weather events, etc. The result is a decrease in callouts for the Paid on Call staff, thus creating sustainability and capacity.

This analysis shows that the Town of Olds is at the crossover point between these two service models. There were 385 calls in 2021, and 2022 is on track to exceed 400 calls. The current workload is too high for a Paid on Call service. Initiatives should be considered to reduce the number of calls that the Paid on Call firefighters attend.

In summary, the community is well served by the Olds Fire Department. That said, the population and calls for service have grown to a point where the current organizational model can no longer meet the community's ongoing and future needs. Critical elements of recovering and maintaining sustainability and capacity are to:

- Increase the full-time staff complement available to respond to calls of service. This will provide operational capacity to respond to events that may not require a fully effective response force, specifically the Paid on Call Firefighters.
- Decrease the number of times the Paid on Call staff are called out. Options may include increased full-time staffing, prioritizing event types/required resources, or adding full-time day shift staff to reduce weekday staffing challenges.
- Clarify service targets. The Olds Fire Master Plan (2019) Council Recommendation #5 states "that subject to Council's consideration and approval of the proposed Fire Services Master Plan that the proposed Depth Response Performance Benchmark including the response of a minimum of 15 firefighters assembled on-scene of a structure fire within a combined turnout and travel time of nine minutes be adopted by the Town of Olds."
- Continue implementing the Olds Fire Master Plan (2019) recommendations where practicable and appropriate.

65. That the Town of Olds considers increasing the full-time, stand-alone Fire Officer/Firefighter group.

66. That the Town of Olds considers options to reduce the number of times the Paid on Call staff are called out.

67. That the Town of Olds considers adopting the Olds Fire Master Plan (2019) Council Recommendation #5.

68. That the Town of Olds considers the continued implementation of the Olds Fire Master Plan (2019) recommendations, where practicable and appropriate as determined by Council and Administration.

Director of Emergency Management (DEM). The DEM position is held by a Paid on Call (PoC) Deputy Fire Chief. Through no one person's fault, the role's effectiveness and efficiency has not been optimal. Typical benchmarks of training, preparation and communication have fallen behind. The current job description is very aspirational, particularly for a Paid on Call position. Best practices, particularly for a municipality the size of Olds, is to assign the role of DEM to a full-time employee, ensuring more consistent communication flow and messaging, more robust relationship building and direct line of sight to the DEM in the case of an emergency. Given the current workload of the Director of Protective Services, we do not recommend adding DEM to that person's portfolio. Typical alternate options include the CAO or a Director/General Manager/Manager with the interest and capacity to take on the responsibility properly. The DEM for the Town of Olds does not need to be a stand-alone full-time position at this time. It is reasonable to assign the responsibility to a full-time employee who has the interest, capacity and training.

69. That the Town of Olds considers assigning the role of DEM to a full-time Town of Olds employee.

Policy 402C Operation of Fire Department is a very brief document that does not contain any service levels. Everything in this policy is already stated in Bylaw 2018-28. This policy may be a carryover from a previous project. Similarly, the 401C Municipal Enforcement Policy seems redundant as the province, or municipal bylaw sets all stated standards.

70. That Policy 402C Operation of Fire Department and Policy 401C Municipal Enforcement Policy be rescinded.

Community Services

What We Heard

- The public expects instant gratification.
- Some staff outside the Town office do not feel like they are part of the Town.
- The relationship with the Operations Department is not as good as in past years as there is no comment back from emails and no reciprocation of labour assistance for priority items.
- Employee recognition would be appreciated - recognize the small stuff and say thanks for a job well done.
- There is no staff social committee.
- Staff BBQs were held with little notice, so pool staff could not attend
- Staff meetings are beneficial but need a month's notice so all recreation staff can attend.
- Lacking safety, records not kept, and an offer to join the safety committee has not been acted on.
- Communication between management and front-line staff is poor; however, this is a two-way street where staff need to tell supervisors what is happening.
- There are lots of checklists but no service levels.
- It can take many years to establish a relationship with service clubs and sports groups before results and benefits are seen (we see the tip of the iceberg).

Analysis

Community Services is a diverse division providing public services directly to the public. Comments were generally positive, with many of the issues already discussed elsewhere in this report. However, a review of various policies and related documents found some areas for improvement and these are discussed below.

The Town of Olds has a Family & Community Support Services (FCSS) Advisory Board bylaw, passed on December 9th, 2019. This Board is tasked with providing preventive social programs/services, which are proactive activities to promote and enhance well-being among individuals, families and communities. The programs should improve the quality of life and build the capacity to prevent or deal with crises should they arise.

Minutes of the Board meetings are kept as a record of decisions, typical of any Town board. Sometimes, with staff turnover and the use of acronyms, errors accidentally become entrenched; this has occurred as the minutes have replaced the word "support" with "social" in the Board name. While the programs related to social services, the bylaw and the provincial FCSS Act refer to "support". It has also crept into the Manager of Community Services job description under the Program Development & Planning section. Further, since the minutes are an official record of the Town, in addition to the Board Chair's signature, they should have a supervisory staff member sign them instead of the recording clerk.

71. That the Family and Community Support Services Advisory Board meeting minutes should be named correctly, signed by the Board Chair and a Town supervisory staff member, and the Manager of Community Services job description be amended to reflect the correct Board name.

The Town operates Nu2U, a unique thrift store run partly by volunteers in the community. Donations of household goods and furniture are accepted and sold through the thrift store. Nu2U grant funds are generated as a result of the sales and are placed in a reserve fund; this is not a typical municipal service and is being subsidized by the taxpayer. A non-profit organization should operate the store, and the Town could provide an annual operational grant to assist with this service. Most communities will see a thrift store run by a local church or non-profit group.

72. That the Nu2U thrift store is closed or turned over to a non-profit organization.

Policy 801C, approved by Council on November 9th, 2020, states that the grant review team consists of the Director of Community Services (CS), the Nu2U Store Supervisor and a minimum of two Nu2U volunteer representatives. This provides an equal or greater representation of volunteers to staff. Procedure 801P, approved by the Executive Team on August 19th, 2021, states that the review team will consist of the Director of CS, the Manager of CS, the Nu2U Store Supervisor and a minimum of one Nu2U volunteer. The Town website states that the committee has the three staff members mentioned and only one volunteer. The procedure and website information has added a manager and reduced input from the community in terms of volunteers, therefore, changing the staff-to-volunteer ratio from 1:1 to 3:1.

73. That Procedure 801P and the Town website be updated to match Policy 801C Nu2U Grant Guidelines. (This recommendation would be redundant if the preceding recommendation is implemented.)

Policy 901C, Recreational Facilities and Sports Fields Use, lays out clear guidelines and priorities for the use of the facilities, including the arenas. Procedure 901.1P, Sportsplex Ice Booking, provides further details, including when ice is available. For example, the Main ice surface is available from the second Monday in August to May 15th; the auxiliary ice is from September 30th to March 15th. Since the cost to maintain ice in late spring and summer may be high relative to use, these deadlines should be under Council's control, making the service level much more visible to the public.

74. That Policy 901C Recreational Facilities and Sports Fields be amended to include sportsplex ice availability dates.

Aquatic Centre statistics shown in the Olds Aquatic Centre report to Council on June 2nd, 2022, are interesting with many numbers, but it does not compare service levels to Council policy. That may be because no service levels exist. A Community Services Program list with service levels and associated costs has been drafted; however, it still needs Council input on goals to be completed. It should focus on services first, and then Administration can determine the cost, not the other way around. Some service levels that could be developed include utilization rate minimums (total spots used vs total available for swimming lessons), quality of swimming lesson instruction (all



instructors meet Lifesaving Society Swim For Life Program qualifications), number of days in a year that water quality exceeded provincial standards or maximum hours that pool can be open in a week or month. Sportsfield and Sportex policies already exist, leaving the missing aquatic one as a significant gap.

75. That an Aquatic Centre service level policy be developed.

As part of the Town's overall commitment to cultural programs, the Heritage, Arts, and Culture budget is funded with revenues collected from ATCO Gas Franchise Fees. This allocation of funding is based on the 2014 motion that directed where the Franchise Fees would go in support of Community Services programs, including the Evergreen Centre, Heritage Arts & Culture (Arts Advisory Committee), Library, Museum, and Special Events. However, franchise Fees can vary yearly, and tying service delivery to a specific revenue stream is risky. If the fee revenues increase, spending could also increase, all the more of a problem without Council deciding the level of service. Conversely, if fees decrease, this revenue shortfall could cause an undesired reduction in service levels. Therefore, service levels should be determined for each program area, and an appropriate budget allocation be determined and not tied to a specific revenue stream.

76. That the Heritage, Arts and Culture budget be determined according to specific service levels and not by ATCO Gas Franchise Fee revenues.



Budget and Finance

A review of the Town's finances was completed, including interviewing the Director of Finance. The interview was comprehensive and in-depth, and a line-by-line discussion was undertaken of the operating and capital budgets and the previous year's final actual financial position.

TSI continued to stay in touch with the Finance Director, who was contacted several times after the interview to provide additional follow-up information. The Director was very accommodating and responsive during these interactions and promptly provided documents, which greatly assisted the analysis.

Methodology

The main point of contact for the financial review was the Director of the Financial Services area, who was, as previously mentioned, very helpful in providing all the necessary financial documents to complete the review. Documents included past and current budgets, financial policies, bylaws, regional fire agreements and past financial reports.

The interview information and financial documentation provided formed a perfect base to analyze the Town's financial processes and final year-end position. Our review included a review of recent financial documents, including:

- The 2021 and 2022 Operating Budgets
- The 2021-Year-End Actuals
- The 3-year Financial Plan
- The Town's 2022 Approved Capital Plan
- The 2022 to 2031 Funding Long-Term Capital Plan
- The 2021 Audited Financial Statement
- The 2020, 2021 and 2022 Mill Rate Bylaws
- The Town's Reserve Policy
- The Reserve Account Statement – December 31st, 2021

Operating and Capital Budgets

The Town uses an EXCEL workbook model for the creation of their operating and capital budgets. The workbook contains the current year's budgets, several years of historical budgets, and year-end positions. In addition, the workbook includes 32 individual spreadsheets for all the departments within the Town and a 33rd spreadsheet that rolls up all the detailed departmental financial data into a summary sheet.

This is an excellent use of the tools and features that EXCEL has to offer. The workbook is well put together and builds off the previous year's budgets and actuals, which is a perfect way to build the upcoming annual budgets. Knowing what budget was required and used from previous years supports a good budget development process in the future.

Each individual department spreadsheet budgets down to the detailed revenue and expense account lines. Again, historical data is included within each department spreadsheet. Having this financial history in one EXCEL workbook is an excellent source of financial data.

The financial data is rolled up in two ways on the summary spreadsheet. Financial revenue and expenses are shown by the department and then by account. Both summary rollups are easy to understand, show transparency in the financial data and show that the budgets are balanced. The Town can rest assured that the budget workbook is designed and managed very well. The summary budget report can be found in Appendix E.

The Town has another EXCEL workbook to manage its capital budget and capital plan. The workbook forecasts all the capital projects for the next ten years and a recommended funding source for each project. In addition, the spreadsheet breaks down individual capital projects by department or municipal service. This workbook represents a high level of municipal capital planning and is very well done. The 10-year Capital Plan can be found in Appendix E.

The Town provides a year-to-date financial statement to Council every quarter. Town administration provides three documents in their report. The first report shows the year-to-date revenues and expenditures by account. The report shows last year's final position, the approved 2022 budget, the financial position at that point in the year and the remaining funds to the end of the year. Additionally, this report shows capital expenditures and reserve transactions at the bottom of the page. The second report is the Town's balance sheet. The two columns compare the final year-end position from the previous year and the financial position at the point in time of the year. Assets and liabilities are shown in this report. The third financial report is a year-to-date report by department. Budgeted revenues and expenditures are shown versus the year-to-date position for each department. The three reports provide very good and transparent financial data to Council. The three year-to-date financial reports can be found in Appendix E.

The Town has a three-year financial plan. This plan projects all revenues and expenditures for the next three years. This plan is projected by individual departments and then summarized in a one-page overview report. The one-page overview is valuable for Council and senior management to have as it shows the current approved budget and two projected future years. The one-page report shows the big picture and is easy to understand for all readers. It is a good financial planning document. The 3-year financial plan can be found in Appendix E.

Assessment and Mill Rates

TSI completed a review of the mill rates, assessment values and budgeted tax revenue from the year 2020 to 2022. They also compared Olds' 2022 mill rates with other comparable communities. The data comparisons are below.

Table 1 shows the mill rates, by assessment category, over the past three years. The mill rates have remained relatively flat over this period, with minimal increases over the three years. Maintaining a flat mill rate over three years makes it difficult to fund approved service levels impacted by growth and inflation each year.

Mill Rates by Category - 2020 to 2022

	2022	2021	2020
Residential	6.0602	5.9414	5.9414
Non-residential	8.2911	8.1285	8.1285
M&E	8.2911	8.1285	8.1285

Table 1

The Town's assessment has also remained relatively flat with a 1.37% increase over the three years. This small increase in assessment value over this period also impacts the ability to generate property tax revenues. Table 2 shows the assessment values by category over the last three years.

Assessment Values by Category - 2019 to 2022

	2022	2021	2020
Residential	\$1,129,868,100	\$1,103,306,380	\$1,086,104,020
Non-residential	\$359,235,520	\$350,929,930	\$402,955,080
M&E	\$30,208,320	\$27,896,630	\$9,674,050
Total	\$1,519,311,940	\$1,482,132,940	\$1,498,733,150

Table 2

The Town's budgeted property tax revenue has remained relatively flat over the 3-year period. The total budgeted property tax revenue has only increased by \$241,937, or 2.46%, over the past three years; this is an average increase of \$80,646 per year. This annual amount does not fund the annual impact of inflation on the budget. When you factor in salary increases, it has an even more significant impact on the operating budget and its ability to fund a continued expected service level. Table 3 shows the tax revenue budgeted on the annual mill rate bylaws. The 2020 to 2022 mill rate bylaws can be found in Appendix E.

Budgeted Tax Revenue by Category - 2019 to 2022

	2022	2021	2020
Residential	\$6,860,893	\$6,579,947	\$6,482,438
Non-residential	\$2,978,458	\$2,852,534	\$3,286,800
M&E	\$250,460	\$226,758	\$78,636
Total	\$10,089,811	\$9,659,239	\$9,847,874

Table 3

TSI gathered comparative data on mill rates from selected municipalities similar to The Town of Olds. The comparative municipalities have similar populations, FTE's/1000 residents and deliver comparable services. Table 4 below shows the residential and non-residential mill rates for Olds and the other

comparable municipalities. Reviewing this data indicates that Olds has the second lowest residential mill rate and a significantly lower non-residential mill rate.

Comparable Mill Rates by Category - 2022

	Olds	Hinton	Coaldale	Drayton Valley	Edson
<i>Population</i>	<i>9,184</i>	<i>9,882</i>	<i>8,917</i>	<i>6,970</i>	<i>8,374</i>
Residential	6.0602	5.5123	10.8293	6.6482	6.3126
Non-residential	8.2911	9.3709	14.2799	13.8529	15.2443

Table 4

Over the past four years, the annual inflation rate for Alberta has hovered between 2% and 4%. However, in 2022 we have seen very high inflation, with many municipal supplies increasing above 10%, especially fuel. The impact of inflation combined with flat mill rates effectively provides less funding for services each year.

Reserves

On December 31st, 2021, the Town of Olds had \$9.7M in reserves, with \$3.0M in general operating reserves and \$6.7M in restricted capital reserves. The Town designates these restricted reserves into service areas such as roads and utilities. The 2021 year-end reserve report can be found in Appendix E.

The Town has a Reserves Policy that defines how a reserve can be created, the purpose of the reserve and the optimum balance of the reserve; this includes the minimum and maximum levels for each reserve. All reserves adhere to the min/max levels as per the policy. The Reserve Policy can be found in Appendix E.

Debt

The Town's municipal profile provided by Alberta Municipal Affairs shows the Town of Olds has a total debt limit of \$36.0M and currently has \$34.1M in outstanding debt; this only leaves \$1.9M in remaining debt capacity. The Town's municipal profile can be found in Appendix E.

The reason for the large amount of debt is related to the recent operational issues with the Olds Connected Community Network (OCCN) and the creation of the O-Net, which operates under Olds Fibre Ltd. As part of this venture, the Town loaned \$14M to the Olds Institute to finance the construction of a high-speed fibre network. Unfortunately, the venture was not successful and the Town now owns all the shares of Olds Fibre. Olds Fibre is operating and paying the loan; however, because the Town has guaranteed the loan, it counts towards the debt limit capacity regulated by Municipal Affairs.

77. That the Town of Olds consider implementing a general phase-in of incrementally increased mill rates that will provide the Town with more funding to provide services.

78. That the Town of Olds consider increasing the non-residential property tax mill rate at a faster rate over the next five years, the current non-residential property tax rate is significantly lower than other peer municipalities.

Conclusions & Next Steps

To ascertain the best course of action for the Town of Olds, the above recommendations have been presented to encourage further dialogue and discussion. Implementation of the newly developed Organizational structure and accompanying review of service levels will assist the Town in achieving Council priorities and meeting the needs of the Town's residents into the future. The Town of Olds is uniquely positioned in the shadow of the Rockies and the middle ground between Calgary and Red Deer. The strong presence of economic development, technology and post-secondary educational facilities and the forward-thinking, progressive approach of the community combines to create the ideal opportunity to build a top-tier organization that will futureproof the community in both livability and prosperity. This endeavour will require collaboration, faith and trust from all parties in aligning Council, Administration and community.

A fruitful conversation will address all the strengths, weaknesses, opportunities and threats raised during the stakeholder consultations, interviews and surveys and provides Administration with the necessary background information to make informed decisions on how to best proceed.

Communities are continuously evolving and ever changing; therefore, those organizations that can anticipate changes on the horizon, pivot when needed and maintain environmental and fiscal sustainability will be better able to achieve their vision for the future. By continuing to work collaboratively and in cooperation in service delivery, TSI believes the Town of Olds is well positioned to become the leading voice in civic Administration.

Next Steps:

- That Council adopts the Organizational and Service Review Report prepared by TSI and instructs the CAO to bring an action plan to the Council to implementation of the recommendations within 45 days.

Upon completing an examination of this Organizational and Service Review, the Administration can assess the recommendations in this report and align each with its strategic priorities and tactics.

The complete list of recommendations provided at the beginning of the report can be used as a template to accept, reject or make amendments to each recommendation. Once completed, Administration can assign leadership, resources and timelines to each accepted or amended recommendation to ensure successful implementation.

Ongoing engagement with employees and community members is essential to measure this initiative's success.

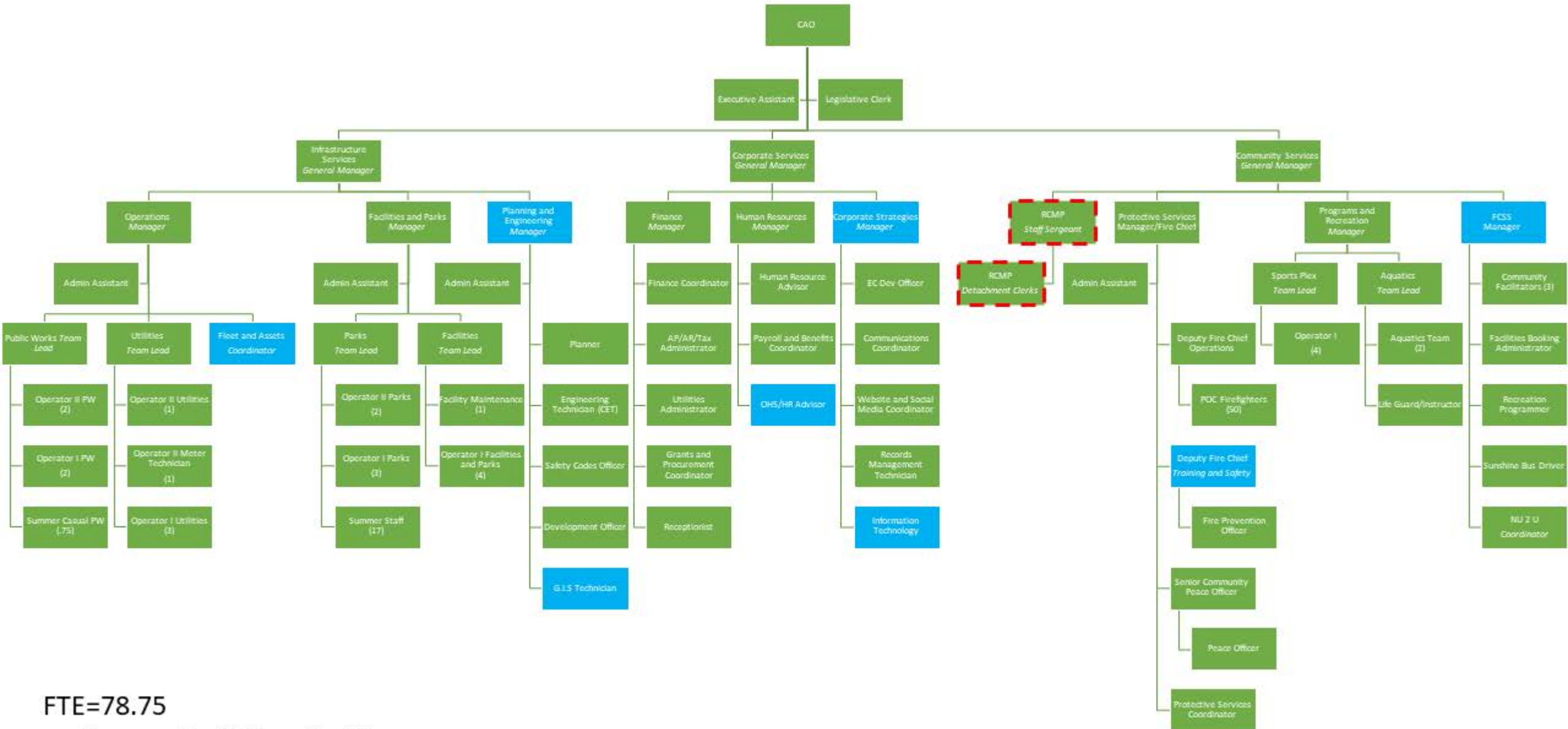


References

1. *The History Of Olds – Canadian History Ehx.* (2021, April 27th). Canadian History Ehx. Retrieved December 1st, 2022, from <https://canadaehx.com/2021/04/27/the-history-of-olds/>
2. “Report A Problem (RAP)” with the following link: <https://www.olds.ca/rap>
3. *Town of Olds 2018 Minimum Design Guidelines*
https://www.olds.ca/sites/default/files/docs/2018_minimum_design_guidelines_approved.pdf
4. *Town of Olds Municipal Development Plan Bylaw No. 2020-14* <https://www.olds.ca/MDP>
5. Town of Olds/Mountain View County 2009-2035 Transportation & Utilities Master Plan Burnt & Associates Engineering (Alberta) Ltd. <https://www.olds.ca/planning-development/engineering/transportation-utilities-planning>
6. Federation of Canadian Municipalities -Municipal Asset Management Program
<https://fcm.ca/en/programs/municipal-asset-management-program>
7. Town of Olds Off-Site Bylaw No. 2018-49 <https://www.olds.ca/town-services/bylaws/site-levy-bylaw>
8. Town of Olds Strategic Plan 2022-2032 <https://www.olds.ca/council/strategic-plan>
9. Town of Olds Master Drainage Plan prepared by Urban Systems February 2018.
10. Town of Olds - 2018 Water Loss Study prepared by Turner Engineering
11. Town policies <https://www.olds.ca/council/policies>
12. Town Bylaws <https://www.olds.ca/council/bylaws>

Appendix A – Proposed Organizational Charts

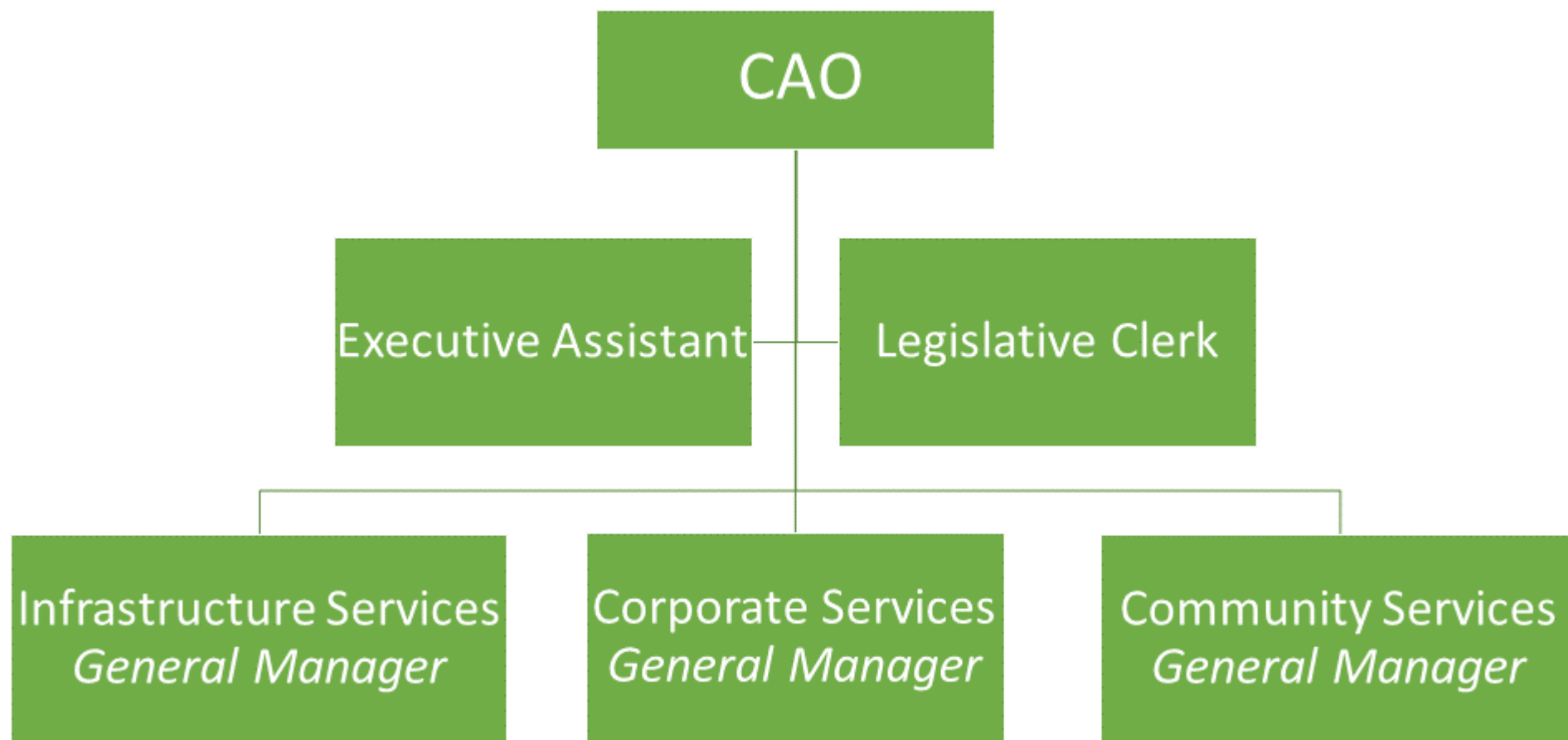
Option A



FTE=78.75

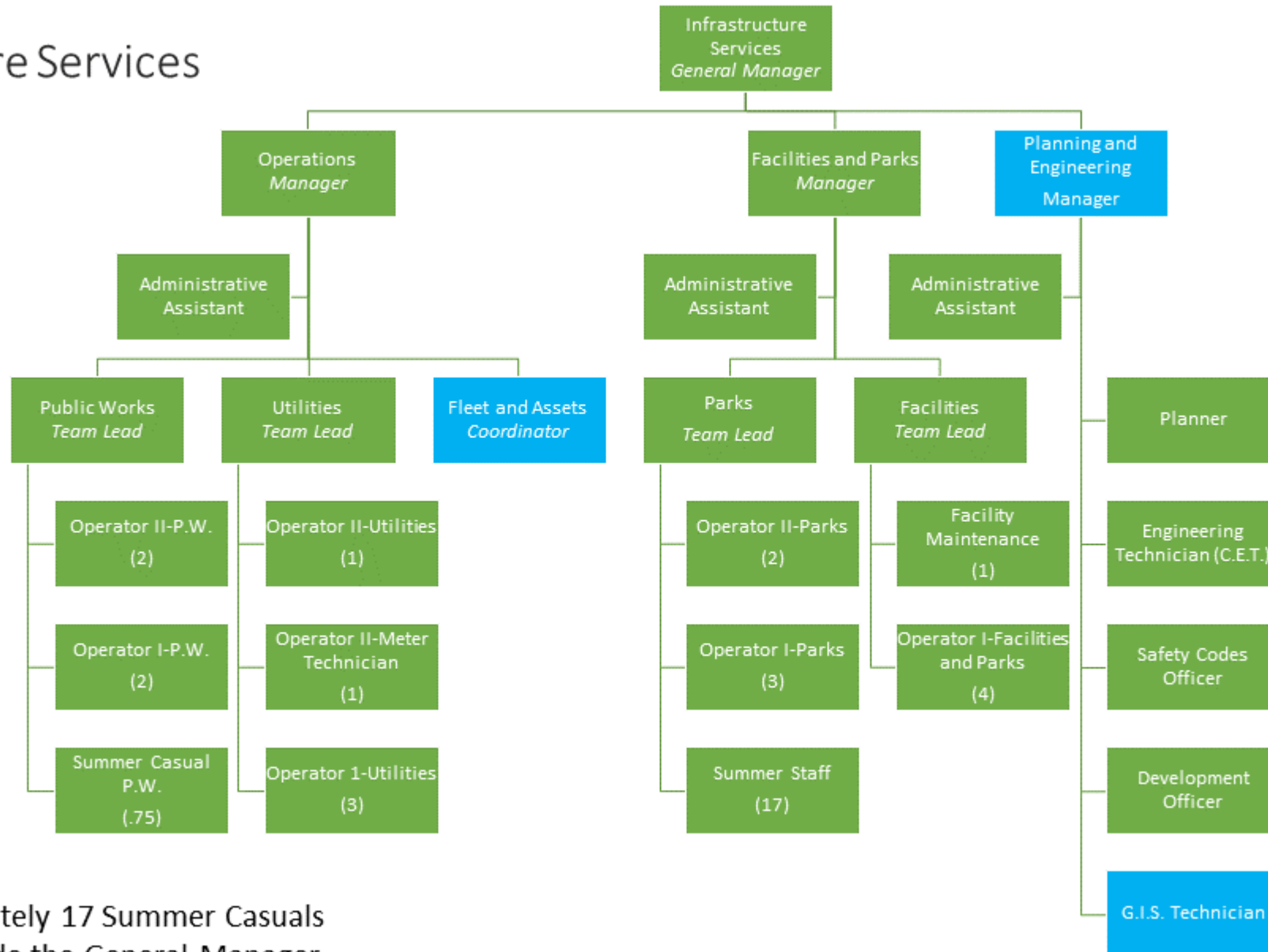
- Proposed = 5 New Positions

Executive Team



FTE = 6

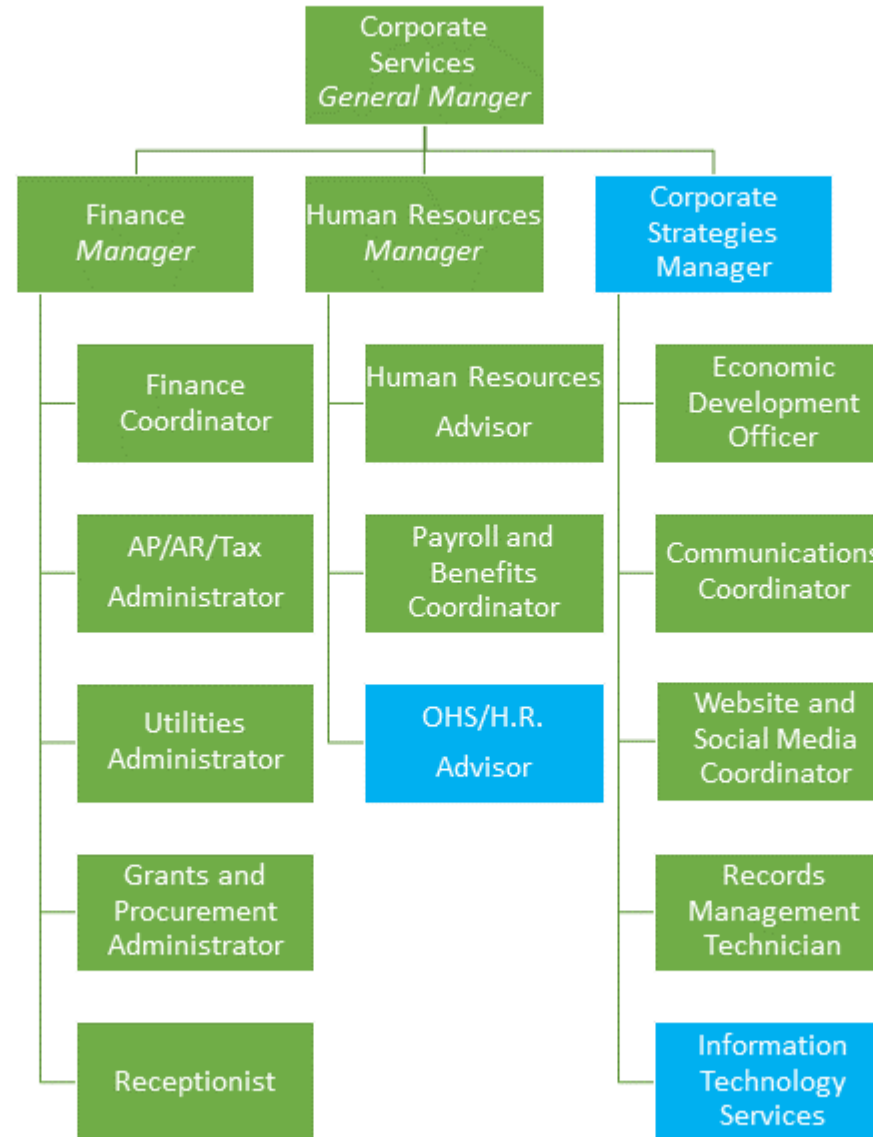
Infrastructure Services



FTE=33.75

- Plus approximately 17 Summer Casuals
- Does not include the General Manager
- *Proposed* = 2

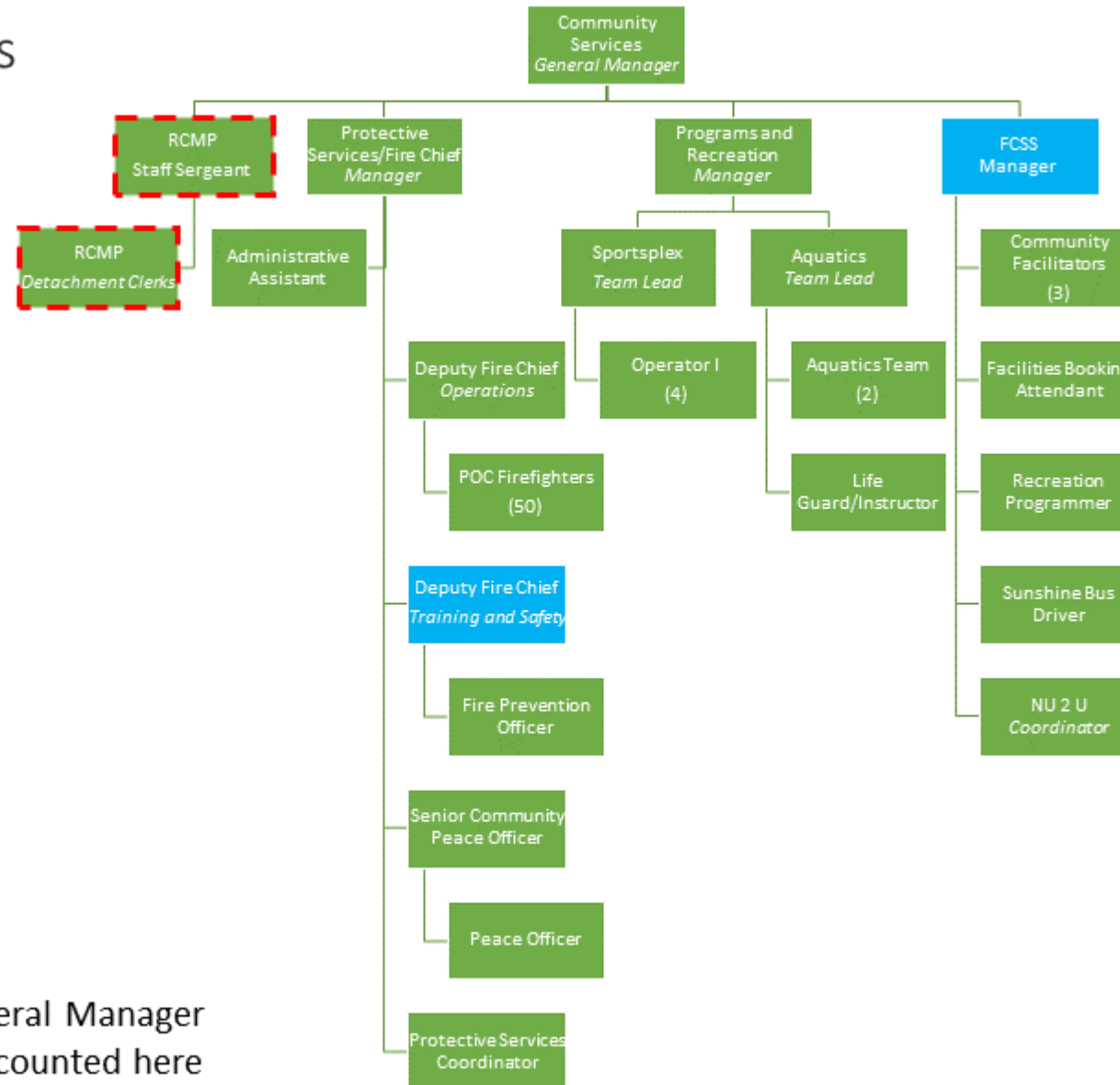
Corporate Services



FTE = 14

- Does not include the General Manager
- *Proposed* = 2

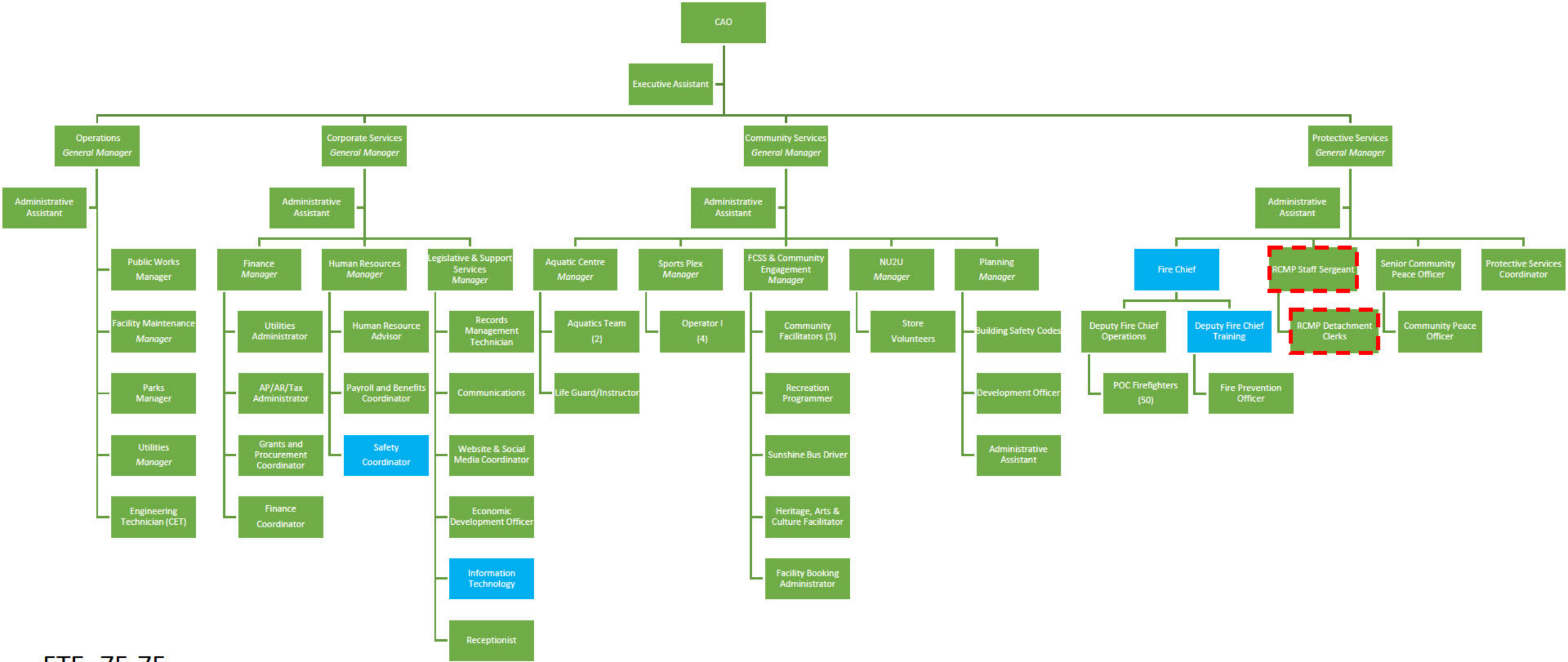
Community Services



FTE = 25

- Plus 50 PoC Firefighters
- Does not include the General Manager
- RCMP S/S and Clerks not counted here
- *Proposed = 1*

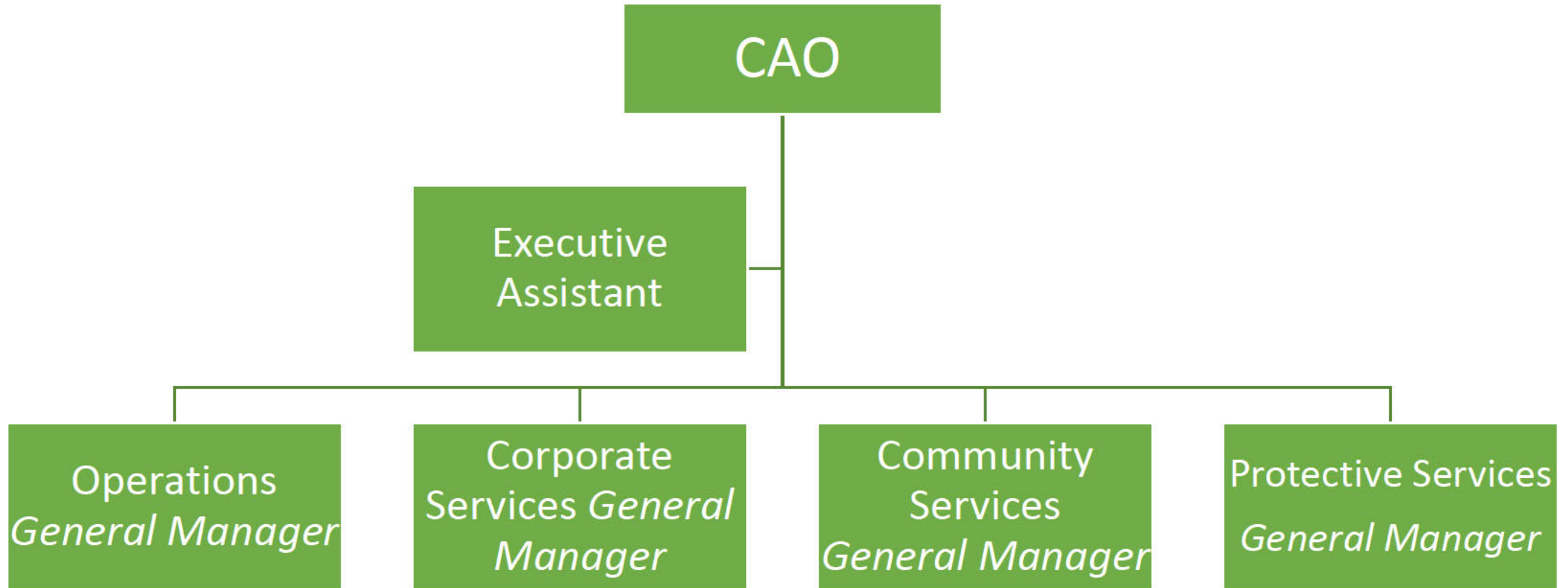
Option B



FTE=75.75

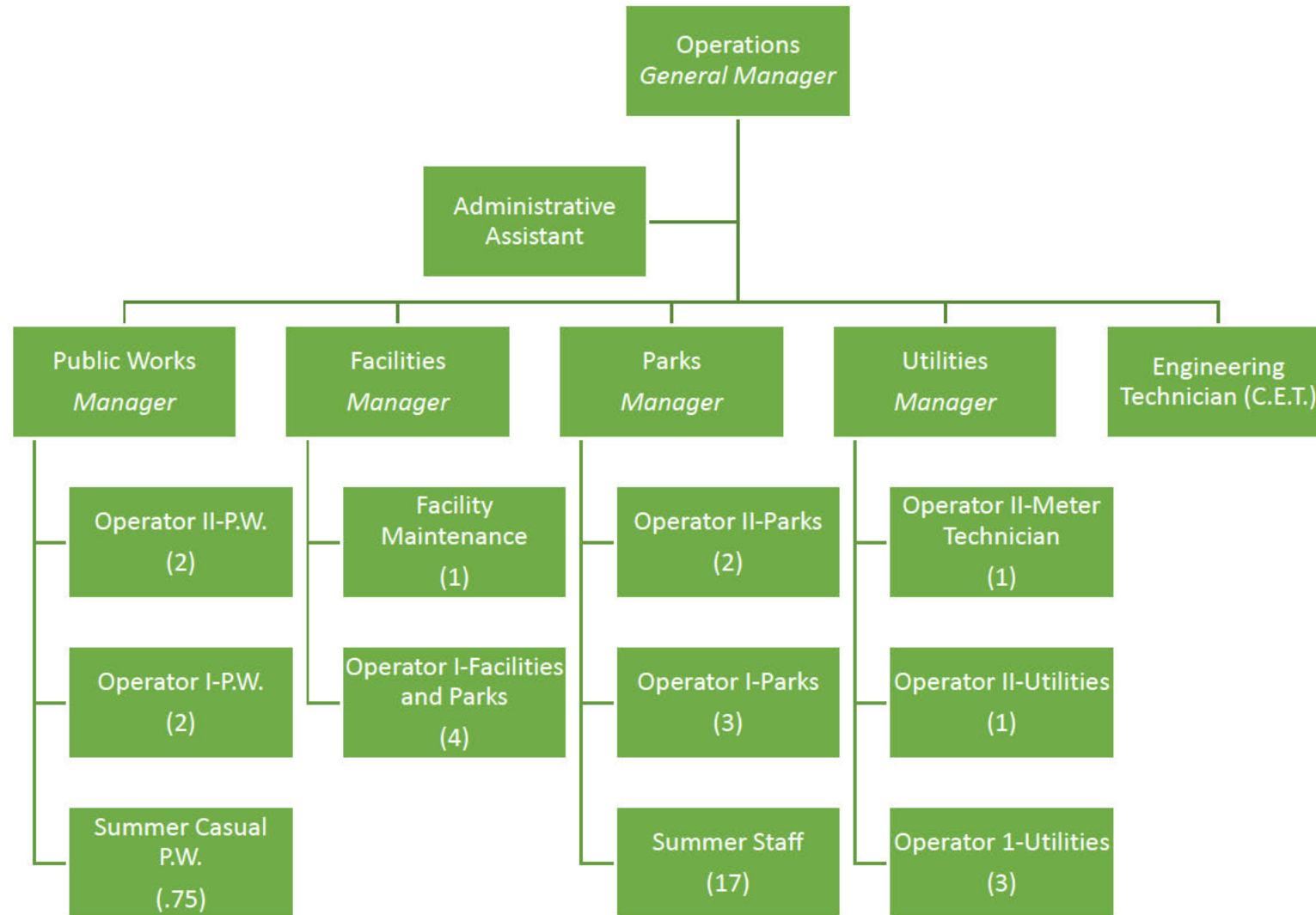
- Proposed = 4 New Positions

Executive Team



FTE = 6

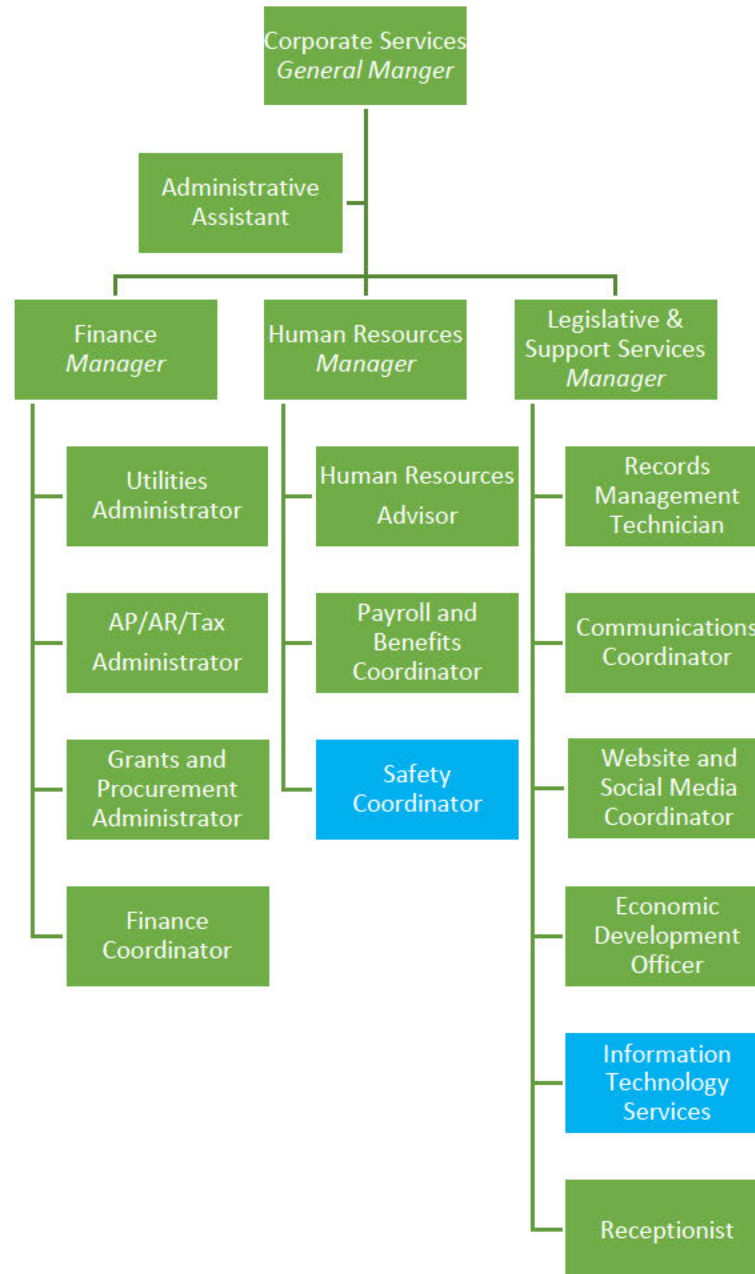
Operations



FTE=25.75

- Plus approximately 17 Summer Casuals
- Does not include the General Manager

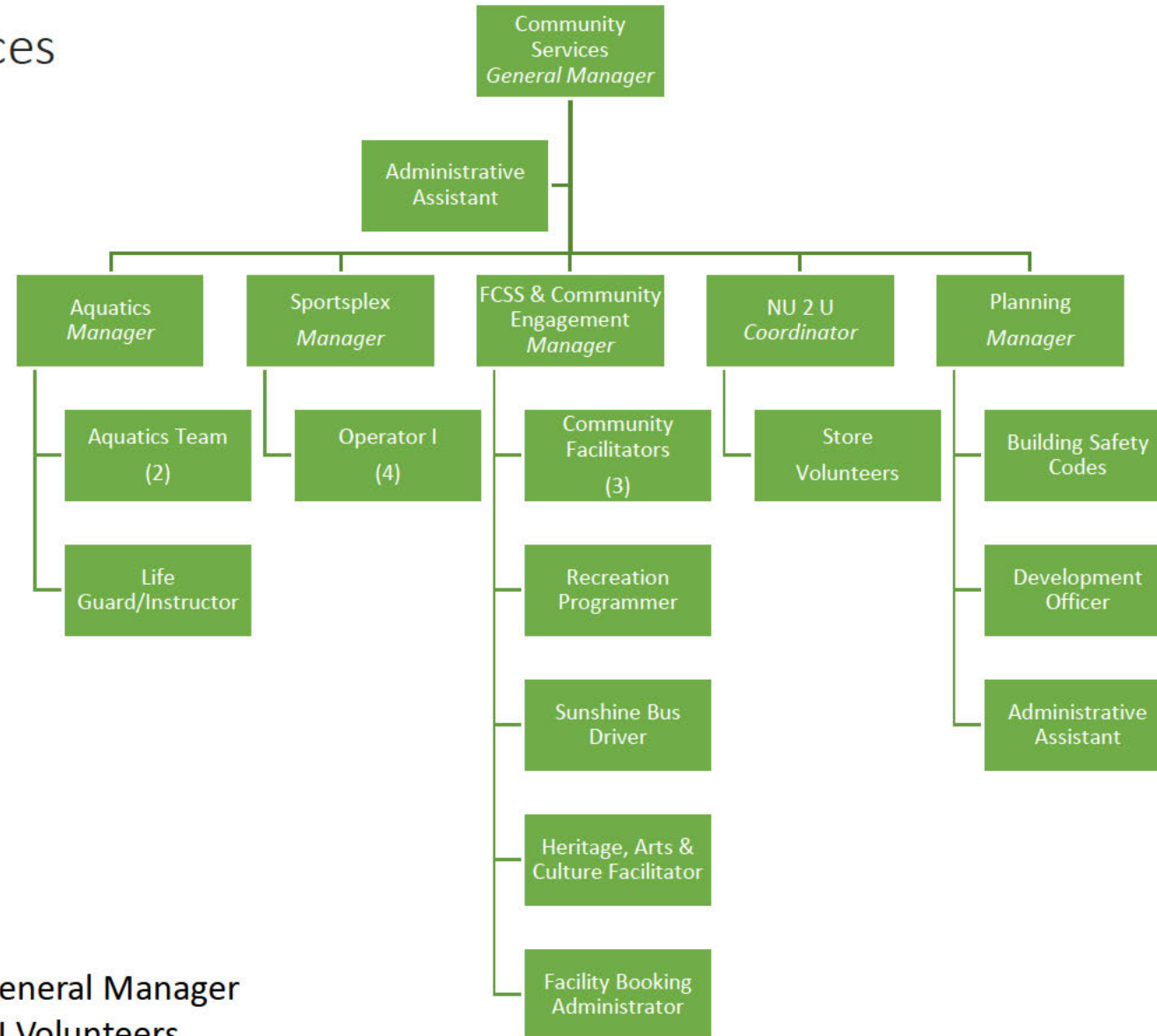
Corporate Services



FTE = 15

- Does not include the General Manager
- *Proposed* = 2

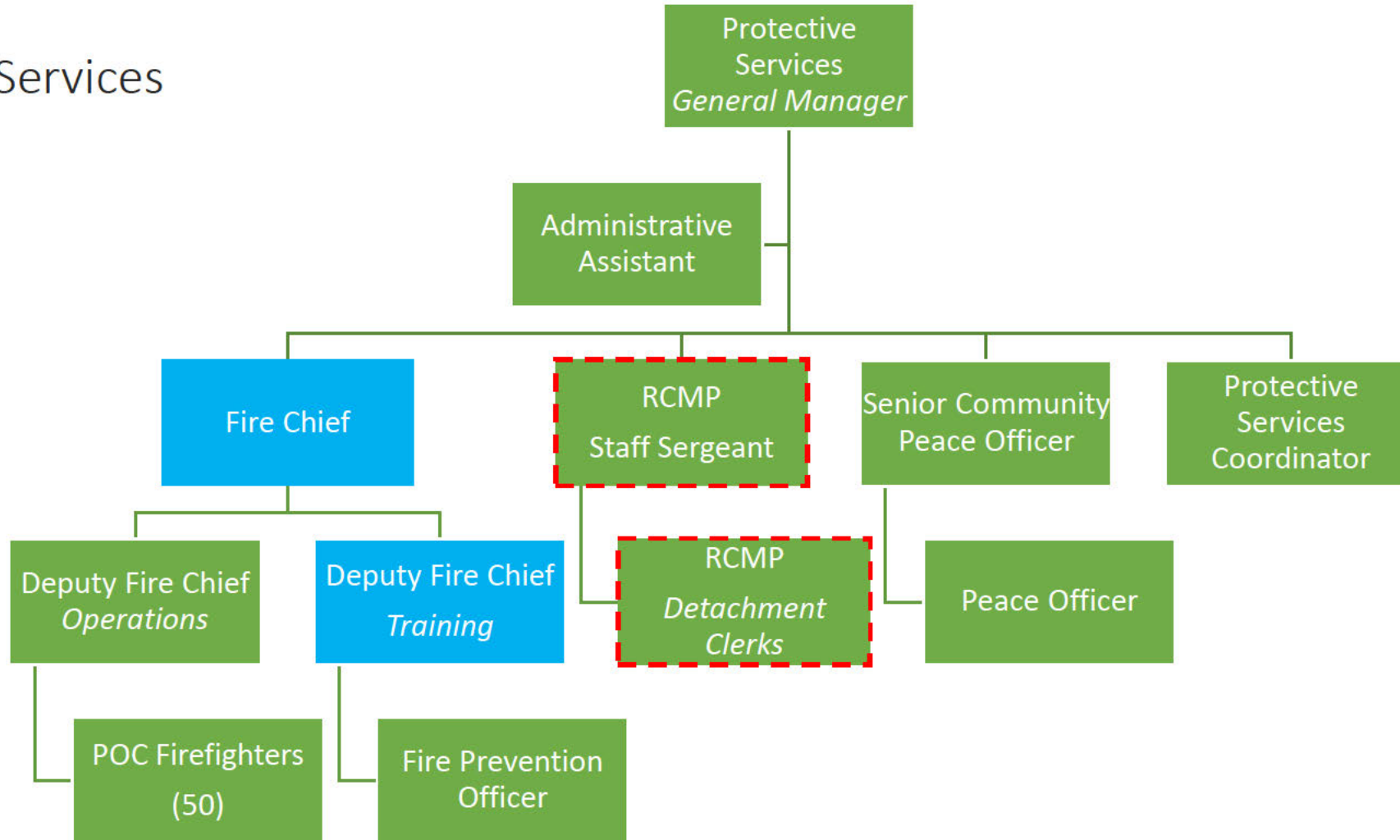
Community Services



FTE = 23

- Does not include the General Manager
- Does not include NU2U Volunteers

Protective Services



FTE = 6

- Plus 50 PoC Firefighters
- Does not include the General Manager
- RCMP S/S and Clerks not counted here
- *Proposed* = 2

Appendix B – Community Comparator Summary Table

	Town of Olds	Town of Coaldale	Town of Drayton Valley	Town of Edson	Town of Hinton	Town of Innisfail	City of Lacombe	Town of Morinville	Town of Ponoka	City of Wetaskiwin
Population	9,209	8,917	6,970	8,374	10,000	7,985	13,400	10,385	7,229	12,594
Equalized Assessment (in millions)	\$1,480.1 (excludes non-taxable properties)	\$1,052.2	1,185.0	\$1,276.4 (Total assessment)	\$1,839.8	\$1,116.7	\$1,874.1 (Residential & Non Residential)	\$1,362.8 (Total assessment)	\$841.0	\$1,333.0 (Total assessment)
Residential Mill Rate	6.0602 (municipal rates only)	10.8293	6.6482	6.3126	5.5123	6.741	11.1092	7.96972	7.79	9.971
Non-Residential Mill Rate	8.2911	14.2799	13.8529	15.2443	9.3709	8.318	13.5188	8.76654	10.17	19.943
# of FTE	76.48	67	117.5	91.5	103	60	205	92.45 ¹	65	112.5
# FTE/ 1000 population	8.3	7.51	16.86	10.93	10.3	7.51	15.29	8.90	8.99	8.93
# of RCMP Municipal Detachment members	11	9	13	17	3	10	26	8	12	31
# of RCMP Rural Detachment members	6	0	8	0	19	0	0	n/a	10	Not available
# of full-time paid firefighters	3	4	5	1	3	0	2	0	0	2
# of paid on-call firefighters	45	35	32	38	23	21	39	40	0	25
# of CPO's	2	3.5	1	2	2	2	0	8	1	2
# of Bylaw Officers	1 seasonal	0	1	0	N/A	0	2	0	0	2
Service fees for Water	\$12.83 + \$2.99/ cubic metre	\$23.10 + \$1.093/ cubic metre	15mm (line size) \$20.25-150mm (line size) \$1537.50 (Rebate of 25% for lines above 25mm in size)	\$1.47/cubic metre	\$74.62 Flat fee, unmetered residential charge per household (2 months)	Flat rate \$10.00/ month + \$2.71/ cubic metre	\$28.57 + \$2.63/ cubic metre	\$26.82 + \$2.75/ cubic metre	\$20.54 + \$0.78/ cubic metre	\$29.68 + \$2.57/ cubic metre
Service fees for Sewer	\$18.40 Flat + \$2.61/ cubic metre consumed	\$22.67 + \$1.063/ cubic metre consumed	Service fee is based off water service fee. Sewer only accounts, fixed	\$1.51/cubic metre consumed	\$31.025 Flat fee, unmetered residential charge per	Flat rate \$10.00/ month + \$3.60/ cubic	Basic \$21.35/ \$2.82 per cubic metre consumed	\$24.74 + \$1.44/ cubic metre consumed	\$22.73 + \$0.74/ cubic metre consumed	\$27.44 + \$1.03/ cubic meter consumed

	Town of Olds	Town of Coaldale	Town of Drayton Valley	Town of Edson	Town of Hinton	Town of Innisfail	City of Lacombe	Town of Morinville	Town of Ponoka	City of Wetaskiwin
			service fee of \$20.25		household (2 months)	metre consumed				
Service fees for Solid Waste	\$24.30	\$29.50 (includes recycling)	Monthly flat rate of \$19.00 for one bin for both solids waste and recycling	Residential \$18.22	\$26.16 Flat fee (2 months)	Residential - \$20.00/ month	Residential Basic \$32.62/ Commercial Basic \$59.97	\$12.56 per month (Garbage per month = \$6.92; Organics per month = \$5.64)	\$20.72	Fees based on cart size. 121L - \$19.41/ month 242L - \$38.82/ month 363L - \$58.22/ month
Service fees for Recycling	\$0	\$9.00 for additional recycling pick-up. \$9.00 for additional compose pick-up	Monthly flat rate of \$19.00 for one bin for both solids waste and recycling	Residential \$10.20 Commercial \$17.40	n/a – there is a capital surcharge of \$10.40 and a water treatment charge \$5.20 per billing	Residential - \$5.00/ month	Cardboard Commercial \$54.83	\$4.58/ month	\$6.87/ month	Currently do not charge for recycling. Looking at adding a fee for 2023.
Rec Centre Daily Pass Fee (Adult)	\$5.75 (aquatic centre)	N/A	Hockey drop in = \$6.00 weekday and \$10.00 weekend Gym drop in = \$8.50	\$6.00 adult pool only, no other day use pass amenities	\$7.50	\$5.25	\$6 Pool only	\$8 + GST	\$5.50/day \$392/year \$60/ month \$170/ month \$58/10 pass	\$8.00 plus GST
# of facilities/ buildings maintained	17 (Peter), 5 utilities (north and south pump stations, 3 lift stations), 1 (regional wastewater commission pump station)	13	Approximately 50 facilities	75+	10; Guild, Rec Centre (swim skate courts climbing), Library, Spray Park, Gordon Moore Park & Mary Reimer Ball Diamonds (washrooms),	11	6 - City Hall, Public Works, Rec Centre (pool & arena), LMC (meeting rooms etc), Fire Hall, Police Station.	6	15	19

	Town of Olds	Town of Coaldale	Town of Drayton Valley	Town of Edson	Town of Hinton	Town of Innisfail	City of Lacombe	Town of Morinville	Town of Ponoka	City of Wetaskiwin
					Infrastructure Services Building, Government Centre, Green Square Building, Municipal Campground					
Services contracted out	IT , Assessment, Financial Auditors, Snow removal, Janitorial, Arborists, Community Planning, General engineering, Waste/ Wastewater collection, Potable Water distribution, GIS, Fire/ Municipal dispatch	Waste collection, property assessment, IT	Waste Collection, mechanical services/ maintenance & Municipal Campground and airport management	ATE (photo radar), campground operation, Leisure Centre (ice plant, pool systems), Garbage Collection, (household & organics), Recycling Services, (via a depot, not curbside), some IT services, Assessment Services	Some snow removal	I.T., H.R.	Planning firm (PCPS), Assessment Services, Inspection agency for permits (building code officers), Engineering Services, salary surveys, mediations, external training	Legal Services, Personal Trainers, Group Fitness Trainers, Snow Removal, Senior In-Home Services (ie. Cleaning, grass cutting, snow clearing, etc.).	Regional Water Commission, Fire Services provided by County	None currently, but multiple RFPs & expressions of interest currently active

¹ FTE count includes only permanent full time (1.0 FTE) and permanent part time (varies from 0.25 to 0.8 FTE, based on their required hours of work) employees. Our casual employees are not included in the FTE counts.

Appendix C – Sample Policy – Parks and Open Space

Parks And Open Space Maintenance Service Standards

Park Classifications

Class A	Class B	Class C	Class E	Sports Fields
<p>High public use / high traffic</p> <p>>2 amenities in park</p> <p>High profile / visibility</p> <p>High function (usable areas)</p> <p>High aesthetic value</p> <p>Parts of the park are bookable</p> <p>High number of park amenities (typically washrooms in proximity)</p> <p>Typically other private amenities close by</p> <p>Examples:</p> <ul style="list-style-type: none"> • Central Park • Saamis Rotary Park • Kin Coulee Park • Police Point Park • Strathcona Island Park • Echo Dale Regional Park • Hillside Cemetery 	<p>Moderate public use / moderate traffic</p> <p>1-2 park amenities</p> <p>Moderate profile</p> <p>Moderate public visibility</p> <p>Moderate aesthetic value</p> <p>Moderate function</p> <p>Typically not bookable spaces</p> <p>Examples:</p> <ul style="list-style-type: none"> • Upland Park • Ross Glen / Saamis Linear Parks • Simpson Park 	<p>Low public use / low traffic</p> <p>0-1 park amenities</p> <p>Moderate profile area</p> <p>Low / moderate visibility</p> <p>Low aesthetic value</p> <p>Low function</p> <p>Low booking potential</p> <p>Examples:</p> <ul style="list-style-type: none"> • Holt Park • Hawke Park • 16th St NE Median 	<p>Rough cut mowing</p> <p>Non manicured aesthetic value</p>	<p>These are classed separately.</p>

Park Definitions

Park Amenities: Benches, picnic areas, spray parks, washrooms, electrical power, kitchens, passive sport opportunities (disc golf), flower beds, a trail through park, and other amenities close by i.e. stores, washrooms, city buildings, pools etc.

Aesthetic Value: Community / Tourism sees space as 'visually pleasant' and would consider it to look good

Day Watering: Irrigating during the day to test and repair irrigation system or to remedy a dry location of turf

Bookable: All open spaces are bookable, however the type of booking is the criteria - booking of kitchens, band shells, and other types of bookings (similar to Public Use)

Visibility: The frequency of someone seeing the space (walking, driving, booking)

Public Use / Traffic: The number of users in or around the park (bookings, passive use, visitors, drive through)

Profile: Public use + aesthetic value + park amenities

Private Amenities: Convenience stores, public buildings, etc.

Function: Public can use the area for a variety of uses (spray parks, community playgrounds, playgrounds, disc golf, kitchens, picnics, fires, running, sports fields close by or within the Park)

Class A Park Maintenance Standards

Fertilize	Aerate	Weed/ Spray	Dethatch/ Overseed	Mow	String Trim	Irrigation	Playgrounds	Tree Maintenance
Up to 2 times per year	Up to 1 time per year	Up to 2 times per year	As required	Height 3"; approx. once week	Approx. every 21 days	1.5" per week	All 81 playgrounds are visually checked weekly and fully inspected monthly from April to September	Tree maintenance is on a 10 year pruning cycle and additional maintenance is done based on risk / need

Note: These timelines may vary and are subject to change based on weather conditions and ongoing review by the Parks and Recreation Department.

List of Class A Parks

Airport Fire Station 3 Median	Hamptons School Park	Riverside Veterans Memorial Park
Airport MW Building Blvd	Heald Park	Ross Glen Towne Park
Airport Terminal Median	Heights Park	Rotary Park
Athletic Park	Hill Park	Saamis Rotary Park
Batus Park	Hillside Cemetery	Sierra SW Blvd
CAM Building	Kin Coulee Park	South Ridge Community Park
Carry Drive SE Blvd	Kiwanis Central Park	South Ridge Drive SE Blvd
Celebration Park	Kiwanis Park	Strachan Road SE Blvd
City Hall	Leinweber Park	Strathcona Island Park
City Hall Blvd	Library	Tourist Centre
Dr Ken Sauer School Park	Lions Park	Trans Canada Hwy Median
Dunmore Road SE Blvd	Maple Ave SE Blvd	Transit and Fleet
Echo Dale Regional Park	Megan Wahl Memorial Park	Turner Park
Electric Utilities	Moose Ball Complex	YMCA Crescent Hts Daycare
Environmental Utilities	Municipal Works Blvd	
Esplanade and Duggan House	Old Cemetery	
Family Leisure Centre	Parkview Drive NE Blvd	
Fire Station 2	Parkview Drive NE Median	
Gas City Campground	Pigeon Street NE Blvd	
Gas Department	Pigeon Street NE Blvd	
Gershaw Drive SW Blvd	Prairie Drive NE Blvd	
Gilwell Park	River Park	

Class B Park Maintenance Standards

Fertilize	Aerate	Weed/ Spray	Dethatch/ Overseed	Mow	String Trim	Irrigation	Playgrounds	Tree Maintenance
Up to 2 times per year	Up to 1 time per year	As required	As required	Height 3"; approx. every 2 weeks	Approx. every 30 days	1.25" per week	All 81 playgrounds are visually checked weekly and fully inspected monthly from April to September	Tree maintenance is on a 10 year pruning cycle and additional maintenance is done based on risk / need

Note: These timelines may vary and are subject to change based on weather conditions and ongoing review by the Parks and Recreation Department.

List of Class B Parks

1 Street SE Park	Kin Park	Rossmere Park
11 Ave NE Park	Lamb Park	Rundle Park
12 Street NW Blvd	Martin Park	Scott Green Park
12 Street NW Blvd	McIntosh Park	Sierra Park
21 Ave SE Blvd	McQueen Park	Simon F. Scott Memorial Park
3 Street NE Blvd	Meadowlands Park	Simpson Park
3 Street SE Blvd	Memorial Arboretum	Somerset Park
Ashburner Park	Muir Park	South Railway Street SE Blvd
Becker Park	Noble Park	South View Villa Park
Boundary Park	Optimist Park	Southlands Park
Calder Park	Osborne Park	Southview Park
Cameron Park	Pacific Street NE Blvd	Spruce Park
Carry Park	Palliser Park	Stone Crescent SE Median
Chartwell Park	Perry Park	Strachan Park
College Drive SE Blvd	Police Point Drive NE Blvd	Stratton Park
Connaught Drive SW Median	Railway Street SE CPR Median	Sundown Park
Connaught Park	Ranchman Park	Sunrise Park
Crestwood Park	Ranchview Park	Sunset Park
Crocket Park	Ravine Park	Sunwood Park
Cunliffe Park	Red Deer Park	Taylor Park
Dan McCharles Park	Redwood Park	Terrace Park
Division Ave N Blvd	Reynolds Park	Terri Clark Park
Dunmore Park	Rice Park	Tower Estates Park
East Glen Park	River Heights Park	Upland Park
EU Water Treatment Plant	Robertson Park	Valleyview Park
Flanagan Park	Ross Glen Green SE Median	Vista Park
Foundry Street SE Blvd	Ross Glen Park	Viterra Park
Hamptons Park	Ross Haven Park	
Jeffries Park	Rossland Park	

Class C Park Maintenance Standards

Fertilize	Aerate	Weed/ Spray	Dethatch/ Overseed	Mow	String Trim	Irrigation	Playgrounds	Tree Maintenance
Up to 1 time per year	None	As required	As required	Height 3"; approx. every 2 weeks	Approx. every 30 days	1" per week	All 81 playgrounds are visually checked weekly and fully inspected monthly from April to September	Tree maintenance is on a 10 year pruning cycle and additional maintenance is done based on risk / need

Note: These timelines may vary and are subject to change based on weather conditions and ongoing review by the Parks and Recreation Department.

List of Class C Parks

10 Ave SW Blvd	College Drive SE Median	Primrose Land Development
13 Ave SE Blvd	Collier Court SE Median	Radisson Park
16 Street NE Central Park	Collier Park	Red Oak Park
16 Street NE East Park	Cornell Crescent SW Median	Riley Park
16 Street NE Median	Craven Place SE Median	Ross Glen Drive SE Blvd
16 Street NE West Park	Crescent Park	Ross Heights Place SE Median
16 Street SE Blvd	Crestwood Drive Median	Ross Turner Park
17 Street SE Blvd	Currie Park	Rossmere Bay SE Median
23 Street SE Blvd	Cypress Way SE Median	Rossmere Court SE Median
25 Street SE Blvd	Dundee Street SE Blvd	Rossmere Green SE Median
27 Street SE Blvd	East Glen Drive SE Blvd	Rossmere Place SE Median
7 Ave NE Blvd	Ewart Park	Sage Road SE Blvd
7 Street NE Blvd	Goldie Park	Shannon Park
Aberdeen Street SE Blvd	Hargrave Park	Slope Park
Anson Ave SW Median	Harlow Park	Somerset Road SE PUL
Belanca Crescent SW Blvd	Hawke Park	Sprague Park
Blue and Green Park	Herald Park	Stein Park
Bray Park	Holt Park	Sterling Park
Bullivant Park	Huckvale Park	Taylor Place Park
Cambridge Road SE Blvd	Hughes Park	Trans Canada Park
Canalta Median	Jackson Place SE Median	Upland Drive SE Median
Canyon Creek Drive SW Median	Kensington Park	Vintage Park
Carry Crescent SE Median	Lokier Park	
Chinook Court SW Median	Lussier Park	
Chinook Park	Maple Ave Fire Station 1	
Church Park	Patrol Park	
Clennel Park	Pioneer Park	

Appendix D – Sample Policy – Customer Service Standards

POLICY TITLE:

CUSTOMER SERVICE STANDARDS POLICY

POLICY STATEMENT:

The Town of Rainbow Lake is committed to providing a high level of service to all its citizens, visitors, community partners, customers, and to one another.

This policy will provide standards by which citizens, customers, internal contacts, and employees can expect their service to be when interacting with the Town of Rainbow Lake and with each other.

EFFECTIVE DATE:

February 23, 2022, as per resolution no. 68-2022

**POLICY GOALS AND
OBJECTIVES:**

1.1 Employees and Department Heads

- a) All Town employees, regardless of what department they work in or what their duties are, are to provide service to the public;
- b) Greet our residents and customers in a friendly manner, and provide them with quality service each and every visit;
- c) Provide friendly and knowledgeable service to residents and customers, and treat them with patience and understanding;
- d) Respect resident's privacy and handle confidential information in an appropriate way;
- e) Be pleasant, courteous, respectful, and helpful;
- f) Respond and acknowledge receipt of customer contact within a timely manner.

1.2 Phones and Emails

- a) Employees are expected to periodically check their emails/voicemails and respond at their earliest convenience;
- b) Employees should identify themselves by using their first name when answering their phone and may state the department they work in;
- c) Employees should use their "Out of Office Assistant" if they are going to be away for more than 48 hours. The message should be brief, include an alternate contact (if applicable), and must identify the date they are returning to the office;
- d) Phone messages/voicemails will be updated as per the situation. If the employee is going away for holidays, they are expected to update their voicemail informing that they are currently unavailable, an alternate contact and a date they will be returning. When the office is closed for Christmas Holidays, the automated message for the office will be updated to reflect the days the office will be closed.

1.3 General Complaints and Abusive Behavior

- a) Handling difficult situations or abusive customers: ("Abusive behavior" is displayed when customers shout, display extreme bullying behavior, use abusive or obscene language, or make a personal threat). Staff are not expected to tolerate abusive behavior. If a staff member feels threatened, he or she is to advise their supervisor of the incident and request assistance if necessary.
- b) If a resident or customer is unhappy with the quality of service received, they may make a complaint or comment in any one of the following ways:
 - In person at the Town Office
 - By letter, email, telephone, or posting on social media

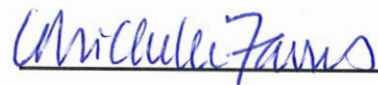
The Town will record and monitor complaints about the quality of service and try to address concerns. We want to learn from complaints so that we can improve the quality of service we provide in the future.

1.4 Service Accessibility

- a) The Town will take all required steps to make sure our services and facilities are accessible to residents, including people with disabilities. The Town will comply with all applicable accessibility legislation requirements.

Amendments:

This policy may, from time to time, may be amended by a majority vote of the Town Council of Rainbow Lake, at a regularly scheduled Council meeting.



Mayor



Chief Administrative Officer

NEXT REVIEW DATE: FEBRUARY 23, 2025

Appendix E – Financial Reports

Revenue and Expense Statements - by Function

For the 06 Months Ended June 30, 2022

	2021 31-Dec	2022 BUDGET	2022 Y-T-D ACTUAL	REMAINING DOLLARS	% COLLECTED USED
OPERATING					
REVENUES					
Taxation	(14,422,427)	(15,009,170)	(15,006,921)	2,249	100%
Sale to Other Govt's	(277,251)	(284,543)	(62,041)	222,501	22%
Sale of Goods and Services	(9,141,189)	(9,923,861)	(5,189,688)	4,734,173	52%
Other Revenue/Franchise Fees	(3,209,859)	(3,297,902)	(1,620,560)	1,677,342	49%
Conditional Grants	(1,622,385)	(1,301,202)	(724,485)	576,717	56%
Transfer From Other Functions	(1,216,167)	(1,203,941)	-	1,203,941	0%
Transfer From Reserves	(1,074,815)	(722,300)	-	722,300	0%
TOTAL REVENUES	<u>(30,964,093)</u>	<u>(31,742,919)</u>	<u>(22,603,694)</u>	<u>9,139,224</u>	<u>71%</u>
EXPENDITURES					
Salaries, Wages & Benefits	8,068,456	8,589,143	3,885,334	(4,703,809)	45%
Contracted & General Services	3,889,813	4,259,167	2,082,629	(2,176,538)	49%
Purchases from Other Government	5,778,667	6,522,800	2,450,169	(4,072,631)	38%
Materials, Goods, Supplies & UT	1,764,990	1,775,900	783,872	(992,028)	44%
Transfer Payments	5,764,339	6,118,987	2,862,916	(3,256,071)	47%
Financial Service Charges	5,796,193	2,165,377	744,524	(1,420,853)	34%
Other Transactions	114,193	-	32,156	32,156	100%
Transfer to Other Functions	1,265,167	1,282,362	-	(1,282,362)	0%
Transfer to Capital	706,973	696,500	-	(696,500)	0%
Transfer to Reserves	1,744,089	332,682	-	(332,682)	0%
TOTAL EXPENDITURES	<u>34,892,882</u>	<u>31,742,919</u>	<u>12,841,600</u>	<u>(18,901,319)</u>	<u>40%</u>
CAPITAL					
FINANCES ACQUIRED					
Long-term Debt & Debentures	(4,476,376)	-	-	-	0%
Other Revenue from Other Sources	(289,758)	(170,278)	(31,920)	138,358	19%
Sale of Fixed Assets	(9,524)	-	-	-	0%
Conditional Grants	(5,170,948)	(4,589,306)	-	4,589,306	0%
Transfer from Operating	(706,973)	(696,500)	-	696,500	0%
Transfer from Reserves	(905,684)	(1,636,940)	-	1,636,940	0%
TOTAL FINANCES ACQUIRED	<u>(11,559,263)</u>	<u>(7,093,024)</u>	<u>(31,920)</u>	<u>7,061,104</u>	<u>0%</u>
FINANCES APPLIED					
Fixed Asset Additions	9,921,654	7,093,024	864,166	(6,228,858)	12%
Transfer Payments	285,904	-	-	-	0%
TOTAL FINANCES APPLIED	<u>10,207,557</u>	<u>7,093,024</u>	<u>864,166</u>	<u>(6,228,858)</u>	<u>12%</u>
Y-T-D (SURPLUS) / DEFICIT	<u>2,577,083</u>	<u>0</u>	<u>(8,929,848)</u>	<u>(8,929,848)</u>	

BALANCE SHEET

As at June 30, 2022

	2021 December 31, 2021	2022 June 30, 2022	
ASSETS			
Cash on Hand & On Deposit	8,493,028	12,116,360	Note 1
Receivables	20,840,203	23,783,671	Note 2
Other Assets	51,932	61,930	
Inventories	14,888	14,888	
Net Fixed Assets	101,143,007	101,143,007	Note 3
TOTAL ASSETS	<u>\$ 130,543,058</u>	<u>\$ 137,119,856</u>	
LIABILITIES			
Accounts Payable	(2,599,630)	(536,127)	
Long term Debt Obligation	(30,723,798)	(30,033,682)	Note 4
Other Liabilities	(1,240,568)	(1,141,878)	
Deferred Revenue	(3,754,473)	(3,723,256)	
Reserves	(9,686,545)	(9,686,545)	
Equity In Fixed Assets	(80,840,645)	(81,371,120)	Note 5
Net Accumulated Operating Surplus - opening	(4,274,483)	(1,697,400)	
plus: Accumulated Surplus Y-T-D	2,577,083	(8,929,848)	
TOTAL LIABILITIES	<u>\$ (130,543,059)</u>	<u>\$ (137,119,856)</u>	

Note 1: Contains deposits in the ATB operating account of \$1,290,943

ATB Investment of \$10,734,382

CIBC Investment of \$10,100

OFL Security GIC of \$80,000

Includes Petty Cash and other deposits of \$935

Note 2: Taxes outstanding as of June 30, 2022 5,146,242

Utilities receivable is \$1,141,027

OFL receivable of \$15,196,319

Other receivables total \$2,300,083

Note 3: TCA and Amortization are only recorded at year end

Note 4: Debentures with Alberta Capital Finance

Note 5: Equity in Fixed Assets increases as debenture and loan payments are made

50% of the year

Per Budget Loaded	REVENUES				EXPENDITURES				Actual Contribution to Surplus
	Budget	YTD Actual	Remaining Dollars	% Collected	Budget	YTD Actual	Remaining Dollars	% Used	
0 General Government	-18,001,112	-16,255,128	-1,745,984	90%	6,311,975	2,389,107	3,922,869	38%	-13,866,022
11 Council & Legislation	-10,500	0	-10,500	0%	467,865	193,429	274,436	41%	193,429
12 Administration	-88,500	-56,928	-31,572	64%	1,191,269	695,615	495,654	58%	638,687
12-01 Office of the CAO	0	0	0		1,003,880	428,497	575,383	43%	428,497
21 RCMP	-518,872	-67,948	-450,924	13%	2,050,141	539,643	1,510,498	26%	471,695
23 Fire Services	-506,256	-138,504	-367,752	27%	1,365,964	640,210	725,755	47%	501,705
24 Disaster Services	0	0	0	0%	67,668	46,822	20,846	69%	46,822
26 Bylaw Enforcement	-52,000	-42,068	-9,932	81%	416,007	139,597	276,410	34%	97,529
31 Common Services	0	0	0	0%	425,501	96,281	329,220	23%	96,281
32 Roads	-445,000	-3,345	-441,655	1%	2,257,838	976,754	1,281,084	43%	973,409
37 Storm Water	-39,050	0	-39,050	0%	39,050	2,495	36,555	6%	2,495
41 Water	-3,257,092	-1,523,133	-1,733,959	47%	3,257,092	1,293,010	1,964,082	40%	-230,123
42 Wastewater	-4,651,184	-2,273,946	-2,377,238	49%	4,651,184	1,656,084	2,995,100	36%	-617,862
43 Solid Waste	-1,098,711	-513,774	-584,937	47%	1,098,711	475,903	622,808	43%	-37,871
51 F.C.S.S.	-278,465	-139,235	-139,231	50%	336,516	121,898	214,618	36%	-17,336
52 Social Development	0		0	0%	0		0	0%	0
5203 NU2U	-155,000	-75,712	-79,288	49%	155,000	74,327	80,673	48%	-1,385
56 Cemetery	-37,600	-20,425	-17,175	54%	151,004	60,459	90,545	40%	40,034
61 Planning & Development	-208,000	-195,323	-12,677	94%	659,894	282,797	377,097	43%	87,473
61 Economic Development	-301,000	-98,088	-202,913	0%	454,093	99,040	355,053	22%	952
62 Sunshine Bus	-12,000	-5,977	-6,023	50%	61,329	24,527	36,802	40%	18,550
72 Recreation Administration	0	0	0	0%	675,004	338,249	336,755	50%	338,249
72 Aquatic Centre	-542,681	-414,662	-128,019	76%	1,141,451	588,104	553,347	52%	173,442
72 Rec. Complex	-625,341	-397,349	-227,992	64%	1,163,516	462,557	700,959	40%	65,207
72 Parks	0	-2,280	2,280	0%	992,207	407,827	584,380	41%	405,548
72 Special Events	-148,383	-321,504	173,121	217%	148,383	271,463	-123,080	183%	-50,041
72 Splash Park	0	0	0	0%	43,350	13,812	29,538	32%	13,812
72 Sports Fields	-30,000	-8,184	-21,817	27%	429,554	168,503	261,051	39%	160,320
72 Campground	-11,500	0	-11,500	0%	2,800	0	2,800	0%	0
74 Museum	-84,421	0	0	0%	84,421	51,808	32,613	61%	51,808
74 Evergreen Centre	-8,155	0	0	0%	8,155	2,055	6,100	25%	2,055
74 Library	-554,132	-48,182	-505,950	9%	554,132	275,726	278,406	50%	227,544
74 Heritage	-77,964	-2,000	-75,964	3%	77,964	24,789	53,175	32%	22,789
Total Operating	-31,742,919	-22,603,694	-9,139,225	71%	31,742,918	12,841,387	18,901,531	40%	-9,762,308

2022 - 2031 Long Term Capital Plan

Long Term Capital Plan	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total
Administration											
Revenue											
From Asset Replacement/Rehabilitation Reserve	-			40,000					-	200,000	240,000
MSI					500,000						500,000
Debenture										-	-
Total	-	-	-	40,000	500,000	-	-	-	-	200,000	740,000
Expenditures											
Town hall - life cycle					500,000						500,000
Chev Equinox (Replace 2014 unit purchased 2014)				40,000							40,000
Engineering/Design new Civic Centre										200,000	200,000
Town Hall										-	-
Total	-	-	-	40,000	500,000	-	-	-	-	200,000	740,000
Fire Service											
Revenue											
From Asset Replacement/Rehabilitation Reserve	13,500	40,000	5,000	35,000	5,000	500,000		850,000			1,448,500
MSI					100,000						100,000
Debenture											-
County Contribution To Apparatus As Per Fire Agreement	5,000	290,000	5,000	35,000	5,000	500,000		850,000			1,690,000
Total	18,500	330,000	10,000	70,000	110,000	1,000,000	-	1,700,000	-	-	3,238,500
Expenditures											
Thermal Imaging Camera 3 in cycle	10,000		10,000		10,000						30,000
Drager Fire Training Prop Buyout	8,500										8,500
610 Command Vehicle (Replacement 2018, 2023)		80,000									80,000
640 RAV (Replaced in 2013, next 2023) _ county funded 100%		250,000									250,000
Hydraulic rescue tools				70,000							70,000
Fire Hall Roof membrane					100,000						100,000
620 Pumper (Pierce)						1,000,000					1,000,000
670 Aerial Platform								1,700,000			1,700,000
Satelite hall											-
Total	18,500	330,000	10,000	70,000	110,000	1,000,000	-	1,700,000	-	-	3,238,500
Bylaw Enforcement											
Revenue											
From Asset Replacement/Rehabilitation Reserve							60,000				60,000
From Operations - Tax Contribution				25,000							25,000
Total	-	-	-	25,000	-	-	60,000	-	-	-	85,000
Expenditures											
Speed Reader Board				25,000							25,000
Tahoe							60,000				60,000
Total	-	-	-	25,000	-	-	60,000	-	-	-	85,000
Operations Equipment Replacement											
Revenue											
From Asset Replacement/Rehabilitation Reserve			280,000			190,000		350,000			820,000
MSI for operations equipment		80,000	80,000	80,000	265,000	240,000	380,000				1,125,000
From Roads - Tax Contribution		55,000	40,000	100,000	-	75,000	40,000		120,000		430,000
From Water - Utilities Contribution	40,000	59,000		100,000		40,000		40,000			279,000
From Wastewater - Utilities Contribution		91,000		60,000	40,000			80,000			271,000
From Parks - Tax Contribution				24,000		42,500					66,500
Total	40,000	285,000	400,000	364,000	305,000	587,500	420,000	470,000	120,000	-	2,991,500



2022 - 2031 Long Term Capital Plan

Long Term Capital Plan	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total
Expenditures											
Vehicle Replacement program 1 per year	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000		360,000
Single axle dump truck with sander and plow			280,000								280,000
Mul i - Purpose tractor		165,000									165,000
Flusher/ Vac Truck (lease payment in Operations)		80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000		640,000
Grader complete with snow wing (lease payment in Opera ions)				40,000	40,000						80,000
Tandem Truck - Sterling				180,000							180,000
Large area mower				24,000							24,000
Second loader (Cat 938K) (lease payment in Operations)					35,000						35,000
Snowblower					110,000						110,000
RTV and sander						65,000					65,000
Ball diamond groomer						7,000					7,000
JD Gator replacement						35,500					35,500
Bobcat mounted snow blower (for any of bobcat or RTV)						10,000					10,000
Tandem axle dump truck with sander and plow						350,000					350,000
Wheeled Excavator							300,000				300,000
Street Sweeper								350,000			350,000
Total	40,000	285,000	400,000	364,000	305,000	587,500	420,000	470,000	120,000	-	2,991,500
Roads											
Revenue											
Federal Gas Tax Fund GRANT	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	5,340,000
MSI Capital for Roads	1,098,400	1,098,400	1,098,400	1,098,400	1,098,400	1,098,400	1,098,400	1,098,400	1,098,400	1,098,400	10,984,000
From Operations - Water	329,500	329,500	329,500	329,500	329,500	329,500	329,500	329,500	329,500	329,500	3,295,000
From Operations - Wastewater	355,000	355,000	355,000	355,000	355,000	355,000	355,000	355,000	355,000	355,000	3,550,000
From Roads Operations - Tax Contribution											-
Total	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	23,169,000
Expenditures											
Municipal Improvement Program	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	23,169,000
Total	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	2,316,900	23,169,000
Storm Water											
Revenue											
From Utilities Capital Reserve											-
Total	-	-	-	-	-	-	-	-	-	-	-
Expenditures											
											-
Total	-	-	-	-	-	-	-	-	-	-	-
Tax Requirement	-	-	-	-	-	-	-	-	-	-	-
Water											
Revenue											
Debenture			1,500,000					1,537,800			3,037,800
North Reservoir Replacement 2/3 funded by others								3,122,200			3,122,200
Total	-	-	1,500,000	-	-	-	-	4,660,000	-	-	6,160,000
Expenditures											
South Reservoir re lining			1,500,000								1,500,000
North Reservoir Replacement								4,660,000			4,660,000
Total	-	-	1,500,000	-	-	-	-	4,660,000	-	-	6,160,000
Wastewater											
Revenue											
From Utilities Capital Reserve	200,000	200,000	200,000								600,000
Total	200,000	200,000	200,000	-	-	-	-	-	-	-	600,000
Expenditures											
Sanitary Relinining Program	200,000	200,000	200,000								600,000
Total	200,000	200,000	200,000	-	-	-	-	-	-	-	600,000



2022 - 2031 Long Term Capital Plan

Long Term Capital Plan											
	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total
Cemetery											
Revenue											
From Asset Replacement/Rehabilitation Reserve						175,000					175,000
MSI	125,000			100,000		-		50,000			275,000
Total	125,000	-	-	100,000	-	175,000	-	50,000	-	-	450,000
Expenditures											
Expansion	125,000			100,000		175,000		50,000			450,000
Total	125,000	-	-	100,000	-	175,000	-	50,000	-	-	450,000
Seniors Trans.											
Revenue											
From Asset Replacement/Rehabilitation Reserve								100,000			100,000
Total	-	-	-	-	-	-	-	100,000	-	-	100,000
Expenditures											
Sunshine Bus Replacement	-	-						100,000			100,000
Total	-	-	-	-	-	-	-	100,000	-	-	100,000
Aquatic Center											
Revenue											
From Asset Replacement/Rehabilitation Reserve	225,000	-	-	-	-	-	-	-			225,000
MSI Aquatic Center	-	125,000	125,000	125,000	125,000	125,000	125,000	125,000			875,000
Total	225,000	125,000	125,000	125,000	125,000	125,000	125,000	125,000	-	-	1,100,000
Expenditures											
Life Cycle	225,000	125,000	125,000	125,000	125,000	125,000	125,000	125,000			1,100,000
Total	225,000	125,000	125,000	125,000	125,000	125,000	125,000	125,000	-	-	1,100,000
Sportsplex											
Revenue											
From Asset Replacement/Rehabilitation Reserve	145,000							25,000			170,000
MSI Sports Complex	-	250,000	250,000	250,000	250,000	250,000	250,000	400,000			1,900,000
Total	145,000	250,000	250,000	250,000	250,000	250,000	250,000	425,000	-	-	2,070,000
Expenditures											
Life Cycle Projects	145,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000			1,895,000
Ice Resurfacer								175,000			175,000
Total	145,000	250,000	250,000	250,000	250,000	250,000	250,000	425,000	-	-	2,070,000
Parks											
Revenue											
MSI for Parks	605,000	505,000	450,000	225,000	350,000	225,000	150,000	675,000			3,185,000
From Others	-										-
Total	605,000	505,000	450,000	225,000	350,000	225,000	150,000	675,000	-	-	3,185,000
Expenditures											
Centennial Park revitalization	250,000	-	-	-	-	-		250,000			500,000
Toboggan hill	50,000										50,000
Outdoor Rink			300,000								300,000
Parks and Playground enhancements	-	200,000			200,000			200,000			600,000
Trails repair and maintenance	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000			1,200,000
Wayfinding	155,000	155,000		75,000		75,000		75,000			535,000
Total	605,000	505,000	450,000	225,000	350,000	225,000	150,000	675,000	-	-	3,185,000



2022 - 2031 Long Term Capital Plan

Long Term Capital Plan	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total
Museum											
Revenue											
From Operations - Tax Contribution				25,000			25,000				50,000
Total	-	-	-	25,000	-	-	25,000	-	-	-	50,000
Expenditures											
Modernization & ongoing upgrades				25,000			25,000				50,000
Total	-	-	-	25,000	-	-	25,000	-	-	-	50,000
Sportsfields											
Revenue											
MSI for Sportsfields	50,000	50,000									100,000
Total	50,000	50,000	-	-	-	-	-	-	-	-	100,000
Expenditures											
Sportsfields (OR Hedges) Revitalization	50,000	50,000									100,000
Total	50,000	50,000	-	-	-	-	-	-	-	-	100,000
Total Capital Revenue	3,725,400	4,061,900	5,251,900	3,540,900	3,956,900	4,679,400	3,346,900	10,521,900	2,436,900	2,516,900	44,039,000
Total Capital Expenditures	3,725,400	4,061,900	5,251,900	3,540,900	3,956,900	4,679,400	3,346,900	10,521,900	2,436,900	2,516,900	44,039,000
Additional Tax Requirement For Capital	-	-	-	-	-	-	-	-	-	-	-
Estimated MSI Grant Funding	1,881,557	1,881,557	1,881,557	1,881,557	1,881,557	1,881,557	1,881,557	1,881,557	1,881,557	1,881,557	18,815,570
MSI Carryforward	0	3,157	-223,686	-345,529	-342,372	-1,149,215	-1,206,058	-1,327,901	-1,794,744	-1,011,587	
Estimated FGTF Funding (current funding levels 2019)	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	5,340,001
	2,415,557	2,418,714	2,191,871	2,070,028	2,073,185	1,266,342	1,209,499	1,087,656	620,813	1,403,971	24,155,571
MSI Projects	1,878,400	2,108,400	2,003,400	1,878,400	2,688,400	1,938,400	2,003,400	2,348,400	1,098,400	1,098,400	19,044,000
FGTF Projects	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	534,000	5,340,000
	2,412,400	2,642,400	2,537,400	2,412,400	3,222,400	2,472,400	2,537,400	2,882,400	1,632,400	1,632,400	24,384,000
MSI Balance	3,157	-223,686	-345,529	-342,372	-1,149,215	-1,206,058	-1,327,901	-1,794,744	-1,011,587	-228,429	-228,429
Debentures Current Year	0	0	1,500,000	0	0	0	0	1,537,800	0	0	3,037,800
Municipal Debenture Beginning Balance (2021 Beginning - 21,827,998)	20,771,994	19,715,089	18,746,843	19,351,672	18,426,649	17,470,677	16,608,897	15,721,473	16,260,397	15,252,533	
Olds Institute Debenture Balance (2021 Beginning - 10,108,805)	9,951,804	9,629,839	9,296,958	8,952,792	8,596,958	8,229,060	7,848,690	7,455,424	7,048,825	6,628,441	
Olds Institute Guarantee	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	
Municipal Debenture Principal Payments	1,056,905	968,246	895,171	925,023	955,972	861,780	887,424	998,876	1,007,864	1,105,848	
Municipal Debenture Interest Payments	625,372	582,367	583,872	554,020	523,070	490,978	465,335	478,347	448,898	523,301	
Olds Institute Debenture Principal Payments	321,965	332,881	344,166	355,834	367,898	380,371	393,266	406,599	420,384	434,636	
Olds Institute Debenture Interest Payments	331,896	320,981	309,695	298,027	285,963	273,491	260,595	247,262	233,478	219,226	
Total Payments Principal & Interest	2,336,138	2,204,474	2,132,903	2,132,903	2,132,903	2,006,620	2,006,620	2,131,084	2,110,623	2,283,010	
2018 Financial Statements Debt Service Limit											
Debenture Ending Balance (2021 Ending - (34,723,798)	33,344,928	32,043,801	32,304,464	31,023,608	29,699,738	28,457,587	27,176,897	27,309,222	25,880,975	24,340,491	
2019 Financial Statements Debt Limit	36,635,333										
From Operations - Tax Contribution (2019 - 0)	0	55,000	40,000	174,000	0	117,500	65,000	0	120,000	0	571,500
From Operations - Utilities Contribution (2019 - 795,000)	724,500	834,500	684,500	844,500	724,500	724,500	684,500	804,500	684,500	684,500	7,395,000
From Reserves (2021 -Beginning Projected 5,348,661)	583,500	240,000	485,000	75,000	5,000	865,000	60,000	1,325,000	0	200,000	3,838,500
Addition to Reserves (Amortization Funded)	462,830	462,830	462,830	462,830	462,830	462,830	462,830	462,830	462,830	462,830	4,628,300
(Decrease) Increase to reserves	-120,670	222,830	-22,170	387,830	457,830	-402,170	402,830	-862,170	462,830	262,830	
Other Funding - External Partners/Fund Raising, etc	5,000	290,000	5,000	35,000	5,000	500,000	0	3,972,200	0	0	4,812,200
Total Funding	3,725,400	4,061,900	5,251,900	3,540,900	3,956,900	4,679,400	3,346,900	10,521,900	2,436,900	2,516,900	44,039,000



Financial Plan 2022 - 2024 by Function

	2022	2023	2024
Taxation	(14,151,272)	(14,434,296)	(14,722,983)
Sale to Other Govt's	(1,083,174)	(1,099,102)	(1,115,348)
Sale of Goods and Services	(9,911,437)	(10,062,781)	(10,215,062)
Other Revenue/Franchise Fees/Permits	(3,170,457)	(3,244,516)	(3,319,657)
Conditional Grants	(683,887)	(683,887)	(683,887)
Transfer From Other Functions	(1,280,388)	(1,304,563)	(1,329,312)
Transfer From Reserves	(178,616)	(141,456)	(157,262)
TOTAL REVENUES	(30,459,231)	(30,970,600)	(31,543,510)
Salaries, Wages & Benefits	8,632,154	8,758,147	8,928,710
Contracted & General Services	3,795,400	3,901,753	4,002,828
Purchases from Other Government	6,456,758	6,624,905	6,793,628
Materials, Goods, Supplies & UT	1,805,885	1,857,003	1,893,843
Transfer Payments	5,963,269	6,068,511	6,175,847
Financial Service Charges	1,696,275	1,564,616	1,371,638
Other Transactions	(55,000)	(55,000)	(55,000)
Transfer to Other Functions	1,280,388	1,304,563	1,329,313
Transfer to Capital	724,500	684,500	739,500
Transfer to Reserves	712,957	630,733	635,644
TOTAL EXPENDITURES	31,012,586	31,339,730	31,815,951
DEFICIT (SURPLUS)	553,355	369,130	272,440



Financial Plan 2022 - 2024 by Department Area

	2022	2023	2024
General Government	(16,842,609)	(17,173,760)	(17,511,536)
Finance	(65,500)	(66,310)	(67,136)
Office of the CAO	(117,000)	(117,000)	(117,000)
RCMP	(562,892)	(564,992)	(567,134)
Fire	(503,849)	(511,506)	(519,316)
Municipal Enforcement	(40,500)	(41,310)	(42,136)
Transportation	(463,900)	(473,018)	(482,318)
Storm Water	(39,050)	(39,050)	(39,050)
Water	(3,202,956)	(3,233,873)	(3,305,538)
Wastewater	(4,661,908)	(4,699,635)	(4,737,718)
Solid Waste	(1,077,688)	(1,107,310)	(1,149,413)
FCSS	(278,465)	(278,465)	(278,465)
NU2U	(155,000)	(155,000)	(155,000)
Cemetery	(41,600)	(41,600)	(41,600)
Planning	(166,500)	(186,500)	(206,500)
Economic Development	(108,120)	(110,282)	(112,488)
Sunshine Bus	(15,300)	(15,606)	(15,918)
Aquatic Centre	(580,119)	(591,219)	(602,540)
Sportsplex	(643,034)	(654,882)	(666,966)
Special Events	(118,150)	(120,547)	(122,997)
Sportsfields	(30,000)	(30,000)	(30,000)
Campground	(11,500)	(11,500)	(11,500)
Museum	(69,844)	(70,389)	(70,961)
Evergreen Centre	(8,194)	(8,466)	(8,759)
Library	(547,395)	(558,061)	(568,993)
Heritage Arts & Culture	(108,156)	(110,319)	(112,526)
Total Revenue	(30,459,231)	(30,970,600)	(31,543,510)
General Government	6,160,157	6,281,469	6,405,298
Council	444,415	452,935	461,628
Finance	1,235,052	1,231,059	1,256,722
Office of the CAO	1,059,085	1,067,927	1,086,945
RCMP	1,855,925	1,849,395	1,740,410
Fire	1,353,869	1,389,896	1,411,574
Disaster Services	114,150	100,933	102,751
Municipal Enforcement	391,249	399,106	407,135
Common Services	424,433	430,323	437,151
Transportation	2,240,080	2,293,565	2,382,720
Storm Water	39,050	39,050	39,050
Water	3,202,956	3,233,873	3,305,538
Wastewater	4,661,908	4,699,635	4,737,718
Solid Waste	1,077,688	1,107,310	1,149,413
FCSS	336,471	336,465	336,465
Social Development	25,750	25,750	25,750
NU2U	155,000	155,000	155,000
Cemetery	146,688	149,572	152,513
Planning	629,301	641,858	654,665
Economic Development	249,367	227,605	232,157
Sunshine Bus	49,844	50,935	52,071
Recreation Administration	720,426	745,234	771,579
Aquatic Centre	1,150,810	1,083,363	1,104,399
Sportsplex	1,120,506	1,141,464	1,162,841
Parks	902,505	920,233	938,316
Special Events	118,150	120,548	122,997
Splashpark	24,500	24,910	25,329
Sportsfields	386,858	390,282	393,775
Campground	2,800	2,800	2,800
Museum	69,844	70,389	70,961
Evergreen Centre	8,194	8,466	8,759
Library	547,395	558,061	568,993
Heritage Arts & Culture	108,156	110,319	112,526
TOTAL EXPENDITURES	31,012,585	31,339,730	31,815,951
DEFICIT (SURPLUS)	553,354	369,129	272,440

Town of Olds

BYLAW NO. 2020-06

2020 PROPERTY TAX and SUPPLEMENTARY PROPERTY TAX BYLAW

A BYLAW TO AUTHORIZE THE RATES OF TAXATION TO BE LEVIED AGAINST ASSESSABLE PROPERTY WITHIN THE TOWN OF OLDS FOR THE 2020 TAXATION YEAR.

WHEREAS, the Council of the Town of Olds shall, by Bylaw, authorize the levying of taxes at such uniform rates on the dollar as the Council deems sufficient to produce the amount of revenue required. Section 353 of the Municipal Government Act RSA 2000 Chapter M-26, as amended, requires Council to annually pass a property tax bylaw;

AND WHEREAS, a property tax bylaw authorizes a Council to impose a tax in respect of property to raise revenue to be used towards the payment of requisitions, expenditures and transfers set out in a municipalities budget;

AND WHEREAS, section 369 of the MGA provides that Council must pass a supplementary property tax bylaw annually to authorize the levying of supplementary property tax in respect for which Supplementary Assessments have been made;

WHEREAS, Council has enacted Bylaw No. 2020-05 to authorize the preparation of supplementary assessments for all improvements in the Town of Olds in 2020

AND WHEREAS, the assessed value of all property in the Town of Olds as shown on the 2019 Assessment roll is:

Description	Total Assessment	Non-Taxable Assessment	Taxable Assessment
Municipal	\$1,736,122,380	\$237,389,230	\$1,498,733,150
Education	\$1,736,122,380	\$261,116,340	\$1,475,006,040
Senior's Housing	\$1,736,122,380	\$237,389,230	\$1,498,733,150
DI Property	\$1,736,122,380	\$1,722,622,870	\$14,899,510

WHEREAS, the Town of Olds has prepared and adopted detailed estimates of the municipal revenue and expenditures as required, at the Council meeting held on April 27, 2020.

WHEREAS, the estimated municipal expenditures and transfers set out in the budget for the Town of Olds for 2020 total \$30,848,570.

WHEREAS, the estimated municipal revenues and transfers from all sources other than taxation is estimated at \$16,293,678 and the balance of \$14,554,892 is to be raised by general municipal taxation; and

WHEREAS, the requisitions pursuant to Sec. 359 (1) Requisitions, are:

Alberta School Foundation Fund (ASFF)	\$4,114,774
Mountain View Senior's Housing	\$554,000
Designated Industrial	\$1,144

NOW THEREFORE, under Section 353 and 369 of the Municipal Government Act, the Council of the Town of Olds, in the Province of Alberta, enacts as follows:

1. That the Chief Administrative Officer is hereby authorized to levy the following rates of taxation on the assessed value of all property as shown on the assessment roll of the Town of Olds.

	Tax Levy Required	Assessment	Tax Rate
General Municipal			
Residential/Farmland	\$6,376,942	\$1,073,125,520	0.0059414
Vacant Residential	\$105,496	\$12,978,500	0.0081285
Non-Residential	\$3,286,800	\$402,955,080	0.0081285
Machinery & Equipment	\$78,636	\$9,674,050	0.0081285
Total	9,835,420	\$1,498,733,150	
 Alberta School Foundation Fund			
Residential/Farmland	\$2,962,404	\$1,075,237,720	0.0027551
Non-Residential	\$1,200,841	\$399,768,320	0.0030038
Total	\$4,163,245	\$1,475,006,040	
Includes an Under Levy	\$48,471		
 M.V. Senior's Housing	\$555,083	\$1,498,733,150	0.00036997
Includes an Over Levy	\$1,083		
 DI Property Requisition	\$1,144	\$14,899,510	0.0000768
 Grand Total	 \$14,554,892 =====		

96
MGA

2. That this bylaw shall take effect on the date of the third and final reading.

Read a first time this 27th day of April, 2020.

Read a second time this 27th day of April, 2020.

Received Unanimous Consent for presentation of third reading this 27th day of April, 2020.

Read a third and final time this 27th day of April, 2020.



Michael Muzychka,
Mayor



Michael Merritt
Chief Administrative Officer

SIGNED by the Chief Elected Official and the Chief Administrative Officer this this 28th day of April, 2020.



Town of Olds

BYLAW NO. 2021-07

2021 PROPERTY TAX and SUPPLEMENTARY PROPERTY TAX BYLAW

A BYLAW TO AUTHORIZE THE RATES OF TAXATION TO BE LEVIED AGAINST ASSESSABLE PROPERTY WITHIN THE TOWN OF OLDS FOR THE 2021 TAXATION YEAR.

WHEREAS, the Council of the Town of Olds shall, by Bylaw, authorize the levying of taxes at such uniform rates on the dollar as the Council deems sufficient to produce the amount of revenue required. Section 353 of the Municipal Government Act RSA 2000 Chapter M-26, as amended, requires Council to annually pass a property tax bylaw;

AND WHEREAS, a property tax bylaw authorizes a Council to impose a tax in respect of property to raise revenue to be used towards the payment of requisitions, expenditures and transfers set out in a municipalities budget;

AND WHEREAS, section 369 of the MGA provides that Council must pass a supplementary property tax bylaw annually to authorize the levying of supplementary property tax in respect for which Supplementary Assessments have been made;

WHEREAS, Council has enacted Bylaw No. 2021-06 to authorize the preparation of supplementary assessments for all improvements in the Town of Olds in 2021

AND WHEREAS, the assessed value of all property in the Town of Olds as shown on the 2020 Assessment roll is:

Description	Total Assessment	Non-Taxable Assessment	Taxable Assessment
Municipal	\$1,719,685,240	\$237,552,300	\$1,482,132,940
Education	\$1,719,685,240	\$278,769,060	\$1,440,916,180
Senior's Housing	\$1,719,685,240	\$240,714,130	\$1,478,971,110
DI Property	\$1,719,685,240	\$1,704,401,970	\$15,283,270

WHEREAS, the Town of Olds has prepared and adopted detailed estimates of the municipal revenue and expenditures as required, at the Council meeting held on April 12, 2021.

WHEREAS, the estimated municipal expenditures and transfers set out in the budget for the Town of Olds for 2021 total \$30,688,823

WHEREAS, the estimated municipal revenues and transfers from all sources other than taxation is estimated at \$16,263,845 and the balance of \$14,424,978 is to be raised by general municipal taxation; and

WHEREAS, the requisitions pursuant to Sec. 359 (1) Requisitions, are:

Alberta School Foundation Fund (ASFF)	\$4,191,126
Mountain View Senior's Housing	\$569,318
Designated Industrial	\$1,171

NOW THEREFORE, under Section 353 and 369 of the Municipal Government Act, the Council of the Town of Olds, in the Province of Alberta, enacts as follows:

1. That the Chief Administrative Officer is hereby authorized to levy the following rates of taxation on the assessed value of all property as shown on the assessment roll of the Town of Olds.

	Tax Levy Required	Assessment	Tax Rate
General Municipal			
Residential/Farmland	\$6,487,916	\$1,091,984,380	0.0059414
Vacant Residential	\$92,031	\$11,322,000	0.0081285
Non-Residential	\$2,852,534	\$350,929,930	0.0081285
Machinery & Equipment	\$226,758	\$27,896,630	0.0081285
Total	\$9,659,239	\$1,482,132,940	
Alberta School Foundation Fund			
Residential/Farmland	\$2,794,625	\$1,093,148,080	0.0025565
Non-Residential	\$1,400,106	\$347,768,100	0.0040260
Total	\$4,194,731	\$1,440,916,180	
Includes an Under Levy	\$3,605		
M.V. Senior's Housing	\$569,837	\$1,478,971,110	0.00038529
Includes an Over Levy	\$519		
DI Property Requisition	\$1,171	\$15,283,270	0.0000766
Grand Total	\$14,424,978		

2. That this bylaw shall take effect on the date of the third and final reading.

Read a first time this 26th day of April, 2021.

Read a second time his 26th day of April, 2021.

Received Unanimous Consent for presentation of third reading his 26th day of April, 2021.

Read a third and final time his 26th day of April, 2021.



Michael Muzychka,
Mayor



Michael Merritt
Chief Administrative Officer

SIGNED by the Chief Elected Official and the Chief Administrative Officer this 29th day of April , 2021.



Town of Olds

BYLAW NO. 2022-09 2022 PROPERTY TAX BYLAW

A BYLAW TO AUTHORIZE THE RATES OF TAXATION TO BE LEVIED AGAINST ASSESSABLE PROPERTY WITHIN THE TOWN OF OLDS FOR THE 2022 TAXATION YEAR.

WHEREAS, the Council of the Town of Olds shall, by Bylaw, authorize the levying of taxes at such uniform rates on the dollar as the Council deems sufficient to produce the amount of revenue required. Section 353 of the Municipal Government Act RSA 2000 Chapter M-26, as amended, requires Council to annually pass a property tax bylaw;

AND WHEREAS, a property tax bylaw authorizes a Council to impose a tax in respect of property to raise revenue to be used towards the payment of requisitions, expenditures and transfers set out in a municipalities budget;

AND WHEREAS, the assessed value of all property in the Town of Olds as shown on the 2021 Assessment roll is:

Description	Total Assessment	Non-Taxable Assessment	Taxable Assessment
Municipal	\$1,769,867,950	\$250,556,010	\$1,519,311,940
Education	\$1,769,867,950	\$294,569,900	\$1,475,298,050
Senior's Housing	\$1,769,867,950	\$253,649,880	\$1,516,218,070
DI Property	\$1,769,867,950	\$1,754,071,870	\$15,796,080

WHEREAS, the Town of Olds has prepared and adopted detailed estimates of the municipal revenue and expenditures as required, at the Council meeting held on April 11, 2022.

WHEREAS, the estimated municipal expenditures and transfers set out in the budget for the Town of Olds for 2022 total \$31,742,919

WHEREAS, the estimated municipal revenues and transfers from all sources other than taxation is estimated at \$16,733,749 and the balance of \$15,009,170 is to be raised by general municipal taxation; and

WHEREAS, the requisitions pursuant to Sec. 359 (1) Requisitions, are:

Alberta School Foundation Fund (ASFF)	\$4,362,435
Mountain View Senior's Housing	\$554,525
Designated Industrial	\$1,210

NOW THEREFORE, under Section 353 and 369 of the Municipal Government Act, the Council of the Town of Olds, in the Province of Alberta, enacts as follows:

1. That the Chief Administrative Officer is hereby authorized to levy the following rates of taxation on the assessed value of all property as shown on the assessment roll of the Town of Olds.

	Tax Levy Required	Assessment	Tax Rate
General Municipal			
Residential/Farmland	\$6,772,379	\$1,117,517,390	0.0060602
Vacant Residential	\$80,379	\$9,694,600	0.0082911
County Residential	\$7,541	2,558,100	0.0029478
County Farmland	\$594	\$98,010	0.0060602
Non-Residential	\$2,977,700	\$359,144,120	0.0082911
County Non-Residential	\$758	\$91,400	0.0082911
Machinery & Equipment	\$250,460	\$30,208,320	0.0082911
Total	\$10,089,811	\$1,519,311,940	

Alberta School Foundation Fund			
Residential/Farmland	\$2,990,577	\$1,119,156,400	0.0026722
Non-Residential	\$1,373,699	\$356,141,650	0.0038572
Total	\$4,364,276	\$1,475,298,050	

Includes an Under Levy \$1,841

M.V. Senior's Housing \$553,873 \$1,516,218,070 0.00036530

Includes an Over Levy \$652

DI Property Requisition \$1,210 \$15,796,080 0.0000766

Grand Total \$15,009,170

2. That this bylaw shall take effect on the date of the third and final reading.

Read a first time this 11 day of April, 2022.

Read a second time this 25 day of April, 2022.

Read a third and final time this 25 day of April, 2022.


Judy Dahl,
Mayor


Sheena Linderman
Interim Chief Administrative Officer

SIGNED by the Chief Elected Official and the Chief Administrative Officer this 26 day of April, 2022.



	31-Dec-20	Increases	Decreases	31-Dec-21
Operating Reserves				
General Operating Reserve	\$ 2,138,012	427,547	694,176	\$ 1,871,383.04
Tax Stabilization Fund	\$ 284,922	10,185		\$ 295,106.69
Fire Operating Reserve	\$ 68,080	3,151	18,080	\$ 53,150.13
Utilities Operating Reserve	\$ 750,623	348,251	362,559	\$ 736,315.32
NU2U	\$ 35,396	4,050		\$ 39,445.56
Olds Fashioned Christmas	\$ 17,434	703		\$ 18,136.82
Total Operating Reserves	\$ 3,294,466	793,886	1,074,815	\$ 3,013,538
Capital Reserves				
General Capital Reserve	\$ 67,252	3,202		\$ 70,453.20
Asset Replacement/Rehabilitation	\$ 1,828,473	636,610	171,310	\$ 2,293,772.00
MR Municipal Reserve	\$ 138,087	6,574		\$ 144,660.51
Restricted Reserve	\$ 67,250	3,485		\$ 70,735.05
Fire Small Equipment	\$ 22,897	1,868	6,850	\$ 17,913.99
Utility Capital Reserve	\$ 2,481,651	133,444	727,523	\$ 1,887,572.04
	\$ -			\$ -
Offsite Levies - Roads	\$ 724,549	184,002		\$ 908,550.27
Offsite Levies - Storm	\$ 264,034	64,283		\$ 328,317.45
Offsite Levies - Water	\$ 433,557	115,197		\$ 548,753.42
Offsite Levies- Wastewater	\$ 314,837	87,443		\$ 402,279.28
Total Capital Reserves	\$ 6,342,585	\$ 1,236,107	\$ 905,684	\$ 6,673,007
Total Reserves	\$ 9,637,051	\$ 2,029,993	\$ 1,980,498	\$ 9,686,545



217C
Reserves Policy

Prepared By: Finance

Effective Date: March 11, 2019
Council Resolution No.: 19-78

References: Municipal Government Act
Investment Policy

POLICY STATEMENT

The Town of Olds recognizes the need to establish reserve funds to ensure the long-term financial stability and flexibility of the Town. Positioning the Town to respond to varying economic conditions and changes affecting the Town's financial position.

PURPOSE

The purpose of this policy is to maintain consistent standards and guidelines for the management of reserves and execution of reserve transactions, and to ensure that all reserve transactions are approved by Council and carried out in accordance with Council's approval.

DEFINITIONS

"Amortization" means a non-cash expense to operations representing a portion of the useful life of a recorded tangible capital asset (TCA).

"Capital Reserves" means the portion of unrestricted net assets that Council has designated (or 'Restricted') to acquire or construct new Capital assets and replace and rehabilitate major Capital infrastructure as required.

"Operating Reserves" means the portion of unrestricted net assets that Council has designated (or 'Restricted') for use in:

- a. Emergencies to sustain financial operations for a reasonable period in the event of significant and unanticipated, unbudgeted increases and/or losses in operating revenues;
- b. Funding budgeted contingencies for non-emergent but unpredictable revenues, volatile expenditures and unanticipated opportunities or challenges; and/or
- c. Funding for the mitigation of tax rate increases.

"Restricted" means a reserve (Operating or Capital) of money that can only be used for specific purposes.

RESPONSIBILITIES

The Director of Finance is responsible for the overall enforcement of this policy.

STANDARDS

1. All reserve transfers must be approved by Council. Approvals may be in the form of:
 - a. The annual Operating or Capital budget approval;
 - b. A carryover project that was contained in an approved Operating or Capital budget; or

- c. A Council resolution.
- 2. Draws from Reserves must not exceed the fund balance unless it can be demonstrated to Council that future sources of revenue will provide adequate funding to return the fund to a positive balance.
- 3. All Operating and Capital Reserve funds must be fully described and include a purpose, source of funding, minimum level, optimum or target level.
- 4. Under direction of Council, the chief administrative officer or their designate will ensure funds are invested according to the guidelines set out in the Town's Investment Policy and in accordance with provincial legislation.
- 5. Interest will be paid to all reserve funds based on the average balance, calculated as the opening plus closing balances divided by two, at the annual average rate of return on long and short-term investments.

Reserves Policy
Schedule A

Fund	Purpose	Funding Source(s)	Minimum \$ Level	Target/Optimum Level
General Municipal Operating	To provide funding for unanticipated operating expenditures in the course of providing municipal services (snow removal), and for unforeseen general operating emergency expenditures.	One-time transfers and one-time unbudgeted sources of revenue.	5% of annual Operating expenditures (excluding utilities and requisitions)	10% of annual Operating expenditures (excluding utilities and requisitions)
Fire Operating Reserve	To provide the Fire Department with the ability to manage unforeseen operating expenses.	Annually 10% of revenue generated from fire calls	0	\$50,000
Nu2U	To provide funding for grants to the community if current year surpluses are inadequate.	Transfers from annual operating surplus of Nu2U department.	0	\$40,000
Olds Fashioned Christmas	To provide funding for shortfalls in operating revenues and to provide funding for approved purchases outside of normal operating expenses.	Transfers from annual operating surplus of Olds Fashioned Christmas event.	0	\$25,000
Utilities Stabilization Fund	To mitigate utility rates and provide funding for unanticipated operating expenditures related to providing water, wastewater, stormwater and solid waste services.	Transfers from annual utilities operating surpluses.	1% of annual Operating expenditures related to water, wastewater, stormwater and solid waste departments.	5% of annual Operating expenditures related to water, wastewater, stormwater and solid waste departments.
Tax Stabilization	To mitigate tax rate increases in cases of an emergent, non-recurring nature.	Transfers from annual operating surpluses (excluding utilities)	1% of annual budgeted municipal property taxes	3% of annual budgeted municipal property taxes
General Capital Reserve	To fund new Capital projects or for Capital expenditures in the case of an emergency	Unspent annual contributions to Capital from operations, and one time transfers to boost reserve levels.	0	No cap.
Asset Replacement/ Rehabilitation	To fund asset rehabilitation and replacement Capital projects	Annual budgeted Amortization of current assets, and one time transfers to boost reserve levels.	0	No cap.

Fire Small Equipment	To provide the Fire Department with Small Capital Equipment as outlined in Schedule "F" of the Fire Services Agreement.		0	No cap.
Utilities Capital Reserve	To fund capital projects related to water, wastewater, stormwater and solid waste infrastructure	Annual budgeted Amortization of current assets, and one time transfers to boost reserve levels.	0	No cap.
Offsite Levies	To fund the future costs of projects in accordance with the off-site levy bylaw.	Levies assessed to development in accordance with the Municipal Government Act.	0	No cap.
Cash in-lieu of Municipal Reserve	To fund public parks, public recreation areas or school authority developments as are allowed by section 671 (2) of the MGA	Funds are collected as part of the subdivision approval process.	0	No cap.
Capital Restricted Reserve	To fund specific Capital projects	Donations received	Unestablished	Unestablished

Town of Olds

Municipal Code: 0239

Location Description

[View Location Map](#) (url to the pdf location map)

Twp	Rge	Mer	Longitude	Latitude
32	1	W5	114°6'	51°47'

Rural neighbour: Mountain View County

Incorporation History

[Municipal Boundary Document Search](#) (url to search results page of Annexation PDF's)

Status:	Town	Effective Date:	July 01, 1905
Authority:	Order in Council	Authority Date:	June 13, 1905
Gazette:	June 30, 1905, p. 5		
Comments:	Erected as the Town of Olds.		

Status:	Village	Effective Date:	May 26, 1896
Authority:	Order in Council	Authority Date:	May 26, 1896
Gazette:	Jun 01, 1896, p. 76		
Comments:	Erected as the Village of Olds.		



Contacts Profile

Created on 9/23/2022 12:51:11PM

Town of Olds

Municipal Code: 0239

Web Site: www.olds.ca

Email: admin@olds.ca

Hours of Operation:

8:30am-4:30pm Mon-Fri

4512 - 46 Street

Olds, AB T4H 1R5

Phone: 403-556-6981

Fax: 403-556-6537

Mayor

Judy Dahl

Email: jdahl@olds.ca

Councillors

Wanda Laurel Blatz

Heather Ryan

James Andrew Cummings

Donald Harvey Walsh

Daniel Robert Daley

Darren James Wilson

Chief Administrative Officer

Brent Williams

Email: bwilliams@olds.ca

MLA & Constituency

Nathan Cooper, Olds-Didsbury-Three Hills

Town of Olds

Municipal Code:0239

Membership in regional services commissions

Mountain View Regional Waste Management Commission

Mountain View Regional Water Services Commission

South Red Deer Regional Wastewater Commission

	<u>2021</u>	<u>2020</u>	<u>2019</u>	<u>2018</u>	<u>2017</u>
Population			9,184	9,184	9,184
Total Full-Time Municipal Positions	69	70	69	70	69
Total Area of Municipality (Hectares)	1,690.0	1,492.0	1,492.0	1,502.6	1,502.6
Number of Hamlets (Specialized Municipalities & Municipal Districts Only)					
Length of all Open Roads Maintained (Kilometers)	111.00	104.80	104.80	104.60	103.70
Water Mains Length (Kilometers)	72.90	84.30	84.30	83.40	82.00
Wastewater Mains Length (Kilometers)	73.70	75.80	75.80	75.20	74.80
Storm Drainage Mains Length (Kilometers)	141.60	50.50	50.50	49.80	49.10
Number of Residences (Summer Villages Only)					
Number of Dwelling Units	3,764	4,190	4,190	4,190	4,157

Town of Olds

Municipal Code: 0239

	<u>2021</u>	<u>2020</u>	<u>2019</u>
Assets			
Cash and Temporary Investments	\$8,411,280	\$15,593,995	\$3,997,477
Taxes & Grants in Place of Taxes Receivable			
Current	463,657	434,339	440,120
Arrears	303,255	210,372	107,534
Allowance	0	0	0
Receivable From Other Governments	297,496	333,597	210,637
Loans Receivable	15,000,000	14,095,626	14,095,626
Trade and Other Receivables	8,662,555	4,525,310	6,178,126
Debt Charges Recoverable	0	0	0
Inventories Held for Resale			
Land	14,888	17,825	22,516
Other	0	0	0
Long Term Investments	81,749	81,760	81,742
Other Current Assets	0	0	0
Other Long Term Assets	0	0	0
Total Financial Assets	\$33,234,880	\$35,292,824	\$25,133,778
Liabilities			
Temporary Loans Payable	\$0	\$0	\$0
Payable to Other Governments	0	0	0
Accounts Payable & Accrued Liabilities	2,599,627	4,131,169	3,061,223
Deposit Liabilities	932,427	786,625	784,255
Deferred Revenue	4,062,616	1,626,071	474,785
Long Term Debt	30,723,798	31,936,804	22,100,186
Other Current Liabilities	0	0	0
Other Long Term Liabilities	0	0	0
Total Liabilities	\$38,318,468	\$38,480,669	\$26,420,449
Net Financial Assets (Net Debt)	\$(5,083,588)	\$(3,187,845)	\$(1,286,671)
Non-Financial Assets			
Tangible Capital Assets	\$101,143,007	\$95,297,594	\$91,224,540
Inventory for Consumption	0	0	0
Prepaid Expenses	43,998	19,975	187,170
Total Non-Financial Assets	\$101,187,005	\$95,317,569	\$91,411,710
Accumulated Surplus	\$96,103,417	\$92,129,724	\$90,125,039

Town of Olds

Municipal Code: 0239

	<u>2021</u>	<u>2020</u>	<u>2019</u>
Accumulated Surplus			
Unrestricted Surplus	5,576,230	4,274,480	1,422,655
Restricted Surplus	9,686,542	9,637,053	8,999,594
Equity in Tangible Capital Assets	80,840,645	78,218,191	79,702,790
	<u>2021</u>	<u>2020</u>	<u>2019</u>
Debt Limit Information			
Debt limit	36,042,534	36,880,847	36,635,333
Actual debt	34,119,669	35,458,486	25,781,895
Debt servicing limit	6,007,089	6,146,808	6,105,889
Actual servicing	2,336,138	2,221,833	1,544,730
Education Taxes	4,195,732	4,059,706	3,998,059

Town of Olds

Municipal Code: 0239

Property Tax Rates (expressed in mills)

2021	<u>Residential/ Farmland</u>	<u>Non-Residential</u>
Municipal Tax Rate	5.9414	8.1285
Education - Alberta School Foundation Fund Tax Rate	2.5565	4.0260
Allowance For Non-Collection of Requisitioned Taxes	0	0
Seniors Lodge Accommodation Tax Rate	0.3853	0.3853
2020	<u>Residential/ Farmland</u>	<u>Non-Residential</u>
Municipal Tax Rate	5.9414	8.1285
Education - Alberta School Foundation Fund Tax Rate	2.7551	3.0038
Allowance For Non-Collection of Requisitioned Taxes	0	0
Seniors Lodge Accommodation Tax Rate	0.3700	0.3700
2019	<u>Residential/ Farmland</u>	<u>Non-Residential</u>
Municipal Tax Rate	5.9414	8.1285
Education - Alberta School Foundation Fund Tax Rate	2.5116	3.6367
Allowance For Non-Collection of Requisitioned Taxes	0	0
Seniors Lodge Accommodation Tax Rate	0.2495	0.2495

Town of Olds

Municipal Code: 0239

	<u>2021</u>	<u>2020</u>	<u>2019</u>
Equalized Assessment			
Residential	\$1,089,742,840	\$1,127,561,551	\$1,125,842,347
Farmland	499,380	502,760	502,990
Non-residential	358,282,887	316,267,799	293,489,284
Non-residential linear	14,085,750	13,921,430	12,961,350
Non-residential railway	0	0	773,020
Non-res. co-generating M&E	0	0	0
Machinery and equipment	55,621,630	9,523,790	8,369,180
Total	\$1,518,232,487	\$1,467,777,330	\$1,441,938,171

Equalized municipal tax rates*	0.0065	0.0065	0.0063
---------------------------------------	--------	--------	--------

* The formula is to divide prior year's Municipal Property Taxes by current year's Total Equalized Assessment

Assessment Statistics

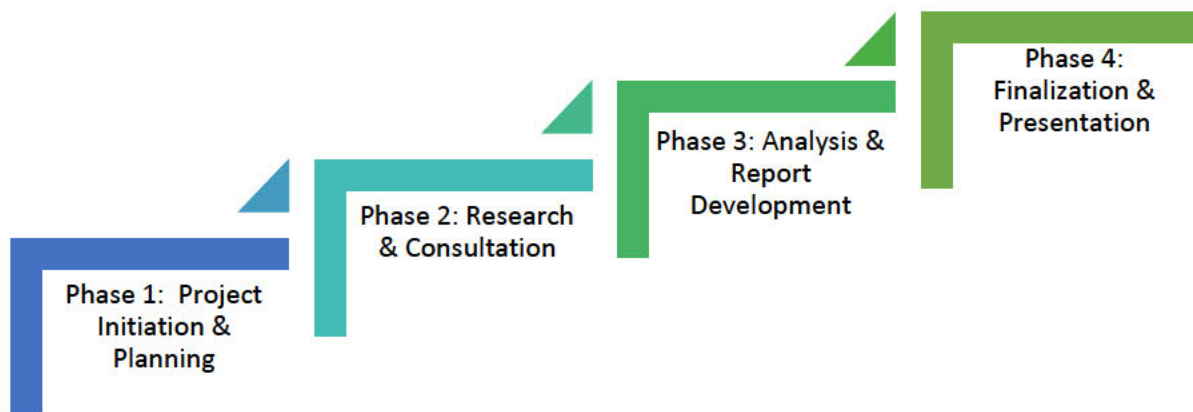
Total assessment services cost	\$75,214	\$82,148	\$74,504
Number of Asst. Complaints Heard by Assessment Review Board	0	0	0

Appendix F – Methodology

Project Methodology

TSI approached this project in a way that centred on principles of sustainability and responsible service provision and aimed to assess the service levels of Town departments objectively. Having worked on multiple assessment projects, the TSI team understands the need to communicate our activities clearly to improve results and instill confidence in participants that their inputs are valuable. To support the scope and project goals listed above, TSI utilized a proven project methodology with a four-phase project work plan that considered all stakeholders and employed best practices.

Phase 1: Project Initiation & Planning



Project Kick-Off Meeting

TSI believes that success comes from starting with a solid foundation. After holding an internal start-up meeting to review deliverables, responsibilities, timelines and milestones, TSI organized a virtual kick-off meeting with the Town of Olds Administration and followed that up with an in-person meeting, and later met with members of Council to ensure that TSI and the Town were on the same page relative to the overall project goals, input requirements, and expected deliverables. Supplementary meetings were held virtually and in person in Olds, where the TSI team confirmed work plans for the overall project with key milestones and schedule confirmed.

This trip initiated the connection of key staff contacts and consultant team members to establish a communication protocol. The start-up discussion was also used as an initial opportunity to collect readily available data required to support the study (e.g. previously developed reports/plans, operational practices and procedures, staffing agreements, standard operating guidelines and procedures, job performance requirements, current governance structure and training systems, training programs and records).

Project Management and Research Team

TSI committed senior consultants and seasoned support members to act as the Project Manager, Subject Matter Experts(SMEs) and Team members for this complex effort. The team ensured the project stayed on track, met its objectives and addressed any concerns or challenges. In addition, the team worked with the CAO, Council and Administration to ensure collaboration and confirm project deliverables before submission.



Project Plan

At the Kick-Off meeting, TSI presented a comprehensive Project Plan that confirmed all key milestones and touch points throughout the project, as well as timelines for consultation, progress reporting, developing draft plans for review, and delivering/presenting all final deliverables. This plan includes a comprehensive stakeholder engagement and communications strategy to ensure key stakeholders are engaged throughout the process. Often forgotten is the impact an organizational and service level review can have on staff, so clear communication is integral to staff's active and sincere participation throughout the process. As such, TSI members met with individual departments and employees to discuss the project, its goals and intentions. Lastly, TSI will discuss any risks or underlying objectives should any be present in the review.

Phase 2: Research and Consultation

Document Review and Desk Research

Following Project Kick-Off, TSI immediately began an in-depth examination of the publicly available documents on the Town's website: Council's Strategic Plan, Policies, Bylaws, Plans and Studies, Asset Management information, Corporate Plans and Master Plans and those which may have been shared in privacy, by the Town.

This in-depth document examination yielded the insight that offered TSI a more detailed lay of the land, an early scanning of practices which informed the questions to be asked during the Stakeholder Consultations. Furthermore, through this review, TSI became more aware of Town processes, systems and activities, allowing TSI to note if these were adequate and in compliance with any changes in Provincial legislative requirements.

To complete the outlined scope of the project, TSI's consultant team undertook a comprehensive approach to gathering the inputs required for analysis. This process included an organizational audit of each department.

Stakeholder Consultations

TSI SMEs commenced surveying and interviewing the CAO, Council and the Town's senior management team who provided insight and input into the Administration's effectiveness relative to service delivery and costs.

These consultative communications allowed TSI SMEs to evaluate the current status of services provided by the Municipality and recognize potential or existing gaps in service. This approach also allowed TSI to measure the Town staff's understanding of how their roles contribute directly or indirectly to the Town's Strategic Plan or department business plans.

These interviews and surveys provided an environmental scan of the departments. In addition, they built a better understanding of historical processes and institutional knowledge and how these relate to the Town's strategic objectives of this project.

Current Service Level Resourcing

TSI's worked with staff, managers, and the Leadership Team to understand the current service levels led to a comparative analysis of the actual and targeted level of service. Along with the financial analysis, TSI could quantify any recommended changes to resource levels to balance the achievement of desired service levels with overall fiscal capacity.

Key Performance Indicators: TSI appreciates the importance of staff and departments understanding their role in the larger organization and ensuring that departmental business plans and individual objectives lend themselves to achieving the Council's strategic priorities. These objectives should also be measurable and part of their annual performance reviews. This also lends itself well to the development of departmental budgets presented to the Council, showing the Council how service levels are tied to budgets and how those service levels are tied directly to the key priorities set by Council.

Benchmarking of Services

In this same spirit, while reviewing the departments for service level gaps and possible new alignments to meet service expectations better, TSI completed a high-level benchmarking comparison against a group of Old's peer municipalities to assess the Town's competitiveness. Any identified significant deviations in service that bears further exploration and consideration as part of achieving the primary purpose of the review were addressed. Additionally, a review of the current management of the departments to maximize innovation and adaptability and look for any duplication/overlap of effort within and between these departments was conducted. TSI also assessed industry trends for services provided and was mindful of these while making recommendations. Additional information and details of the comparators can be found in Appendix B.

Assumption/Risk – TSI assumed that all identified stakeholders would participate. Furthermore, we assumed that participants were honest and objective in their remarks. It is always a risk in projects requiring engagement that stakeholders will not be available, willing or honest in their comments. TSI understands this and can find the truth in the mix of remarks and interviews and continues to research and dig when those truths are difficult to ascertain. TSI canvassed nine (9) similarly positioned municipalities, and of those contacted, nine contacted all replied and provided information.

Financial Review

TSI's senior Financial SME reviewed the current and historical budgets and audited financial statements of the Town of Olds. TSI is committed to holding such crucial information in confidence. This exercise will include a review of staffing levels and pay grids, as salaries and benefits are one of the municipality's most significant expenditures where efficiencies are most often found.

Additionally, TSI reviewed the Municipality's reserves and the current and past year Mill Rate bylaw and assessment data.

Phase 3: Analysis & Report Development

Following the Research and Consultation Phase, TSI began a comprehensive analysis of all data collected in Phase 2 and the benchmarking and SWOT activities. This more extensive analysis discovered significant patterns and trends in perceptions regarding the current level of mandatory and discretionary services provided by Town departments. These findings allowed TSI to develop recommendations to the Town that may improve, maintain or relax levels of services.

TSI recognizes that any recommendations must work with the culture, vision, financial and environmental sustainability of the Municipality and enjoy the support and buy-in of Council and all senior leaders in the Administration.

Phase 4: Finalization & Presentation

The report identifies potential restructuring activities and services, defines service level standards and measures results utilizing key performance indicators. As advised, TSI will come before the Town Council to present the findings and implementation plan at a Council meeting.

REPORT PREPARED BY:



240, 2833 Broadmoor Blvd | Sherwood Park, AB | T8H 2H3 | 587-583-4308

www.transitionalsolutions.ca
