

Municipal Program Assessment: Accounts Payable

Department/Division: Finance Division

Executive Summary

This report assesses opportunities to modernize Accounts Payable (AP) by moving from the current email/SharePoint and paper-dependent workflow to a fully digital invoice intake, approval, and retention process integrated with Business Central. AP processes approximately 1,500 invoices per month with significant overtime, and volumes are expected to increase with organizational growth. A paperless solution is expected to improve processing speed, accuracy, auditability, and transparency while reducing printing, storage, and manual handling.

Three options are considered as part of this review:

- **Option A: Maintain the current AP process (status quo).**
Budget savings: None - continued overtime pressure and higher risk of requiring additional staffing as invoice volumes grow.
- **Option B: Implement a phased paperless AP module/workflow**
Integrated with Business Central.
Budget savings: one-time implementation cost estimated at \$30,000–\$60,000 plus staff time; ongoing annual system cost estimated at \$10,000–\$20,000. Current AP budget is not expected to decrease; however, avoided staffing costs as volumes grow are estimated up to \$105,000 annually, resulting in net cost avoidance of up to \$95,000 per year after implementation.
- **Option C: Implement select digital improvements**
Without a full end-to-end solution (e.g., digital invoice capture, electronic approvals, limited vendor self-service, or process redesign while retaining parts of the current workflow).
Budget savings: None - partial efficiency gains but may not fully eliminate manual entry, printing, and filing, and may not fully avoid future staffing needs.

Department Recommendation:

Proceed with Option B - A phased implementation of the paperless AP module/workflow integrated with Business Central, beginning with a pilot in high-volume departments, followed by organization-wide rollout.

1. Current Program Overview

Program Name: Accounts Payable

Department/Division: Corporate Finance

Legislative Mandate:

- Municipal Act section 286 (1)(c)
- County of Dufferin Procurement By-law to ensure contractors are paid on time
- Public Sector Accounting Standards (PSAS): PS 1000

Program Description:

- Processing vendor payments through accounts payable

Goals and Objectives:

- The Accounts Payable (AP) program ensures timely, accurate, and compliant payment of all municipal obligations. It processes vendor invoices, employee reimbursements, utility payments, debt payments, capital payments and contract-related disbursements. The program supports financial stewardship, maintains vendor relationships, and ensures adherence to internal controls. Program assist all the departments throughout the County of Dufferin.
- Reduce manual, paper-based processes by transitioning to a fully digital invoice workflow.
- Improve processing speed and accuracy through automation and standardized digital approvals.
- Strengthen auditability and transparency with electronic document retention.

Strengths:

- Payments are made on a timely basis
- Effectively supporting all departments across the organization
- Good working relationships with departments and vendors.

Weaknesses:

- Volume of existing accounts payable and associated manual processes leads to excess staff overtime and the need for continuous support from other staff members
- Significant number of e-mails coming into Accounts Payable requiring response
- Manual paper filing of invoices, takes up significant office footprint
- Longer lead time resulting in vendor inquiries
- Current approval invoice system is inefficient, significant amount of time spent uploading invoices to SharePoint, for coding and approval by department, printing,
- Finance processing and approvals to generate payments are time consuming

Current Delivery Method:

- Direct delivery by Accounts Payable staff to go through significant number of e-mails from vendor, upload them to SharePoint for departments to code and approve, approved

invoices are printed and entered Business Central for payment. Once approved for payment their filed manually.

2. Potential Changes

Describe areas under consideration

- Implement digital invoice capture and automated workflow routing.
- Introduce electronic approvals to replace physical signatures.
- Deploy vendor self-service tools for electronic invoice submission and status tracking.
- Integrate AP processes with existing ERP systems to reduce duplication and manual entry.
- Providing services using an alternate delivery method
- Transition to a paperless AP environment using digital invoice capture, automated workflows, and electronic approvals.
- Redesign processes to eliminate redundant steps and reduce manual intervention.
- Explore integration with existing ERP systems to streamline data flow.

3. Key Performance Indicators (KPIs)

Current KPIs: Currently AP process 1500 invoices per month with 1.5 employees and require significant overtime. This is expected to increase as County grows.

Impact on KPIs: Going paperless will result in Finance supporting the growth without the need for additional staff to support growth.

Data Collection Methods: System-generated reports

Baseline Data: Currently Staff is putting in overtime on regular basis, this is to significantly reduce and down to 1 person responsible for AP once new system is implemented.

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel costs

- Currently 1.5 finance staff are dedicated to processing, \$152,800

Operating Expenses: n/a

Contracted Services: n/a

Capital Expenditures: n/a

Projected Savings

- Additional one-time costs would be required for implementation of the new system, between \$30,000 - \$60,000, plus staff time to assist in implementation
- Annual fee for new system estimated at \$10,000 - \$20,000.
- As we only have 1 person dedicated to Accounts Payable there will not be cost savings to current budget, however program will eliminate the need for additional staff due to growth,

likely result in up to \$105,000 in annual savings. Current staff assisting with accounts payable would be redirected to payroll

- Net saving of up to \$95,000 per year after implementation

Cost-Benefit Analysis

Costs:

- **Cybersecurity risks:** Digitizing AP processes increases exposure to cyber threats such as hacking, phishing, unauthorized access, and ransomware. Because AP handles sensitive financial information, the system becomes a target for fraud attempts and data breaches.
- **Staff resistance and training challenges:** Employees accustomed to paper-based workflows may resist the transition. Without proper training, staff may make errors in coding, routing, or approving invoices. Productivity may temporarily decline during the learning period.
- **Integration difficulties:** A paperless AP system must be integrated with Business Central. Poor integration can result in duplicate entries, missing invoices, or broken workflows. Even small mismatches in data formats or approval rules can cause delays.
- **Upfront and ongoing costs:** Although long-term savings are possible, initial costs can be significant. Expenses may include software licensing, implementation services, training, and IT infrastructure upgrades. Smaller organizations may find these costs challenging.
- **Compliance and audit risks:** Digital records must meet regulatory requirements for retention, accessibility, and audit trails. If the system is not configured correctly, organizations may face missing documentation, incomplete audit logs, or difficulty demonstrating compliance during audits.
- **Changes to internal controls:** Paperless systems require redesigned internal controls. If controls are not updated to match the new digital workflow, financial oversight may weaken and increase the risk of errors or fraud.

Benefits:

- Faster processing, improved accuracy, enhanced audit trails, and long-term cost savings.
- Implementing a paperless Accounts Payable (AP) system can improve efficiency, reduce manual work, and support better financial controls.
- Improve Storage and retrieval documents as not all departments are currently using SharePoint and invoices are printed, coded and sent to Finance with approval.
- No need to manually file Invoices.
- Frees up physical storage
- Reduce staff overtime as there is only 1 individual assigned to AP
- Real-time visibility into invoice status
- Consistent compliance with payment timelines.
- Cost and Staff time to implement paperless AP program.
- **Technology dependence:** A paperless AP system relies entirely on software, servers, and network connectivity. Any system outage, slow performance, or technical failure can halt

invoice processing and delay payments. Organizations without strong IT support may experience disruptions.

- Other savings include:
 - Savings on significant staff time spent on manual entry, filing, and physical routing.
 - Savings on Paper, printing, storage, couriering, and physical archiving.
 - Reduce scanning or storage services.
 - Savings on record destruction Cost as there will be no more paper.
 - Capital Expenditures: Filing cabinets, storage space, and physical infrastructure.

Support Costs:

- Interdepartmental support required for this program will primarily be IT to assist with implementation.
- All the other departments need to be trained on usage of the program.

5. Service Delivery Impact

Updated Service: A fully digital AP service where invoices are received electronically, routed automatically, approved digitally, and stored in an electronic repository.

Revised Goals and Objectives:

- Achieve 100% digital invoice intake.
- Reduce invoice processing time by a targeted percentage.
- Improve vendor satisfaction through transparency and faster turnaround.

New Service Delivery Model

Service will be delivered electronically and paperless process.

- Impact on Service Recipients:
 - Everyone in the County who codes, reviews and approves invoices will benefit from paperless processes.
 - Vendors benefit from faster payments and improved visibility.
 - Internal staff experience reduced administrative burden and fewer manual tasks.
 - Departments gain easier access to invoice records and status updates.
- Access and Equity Considerations:
 - No one externally be impacted by it as this is a change to internal process.
- Quality Assurance Measures
 - Through regular monitoring of workflow performance and processes.

6. Impact Analysis

Alignment with Strategic Goals:

Climate and Environment

- The plan identifies establishing the County as a leader in climate action and conserving the natural environment.

- A paperless AP system directly supports this by:
 - Reducing paper consumption and physical storage needs
 - Lowering transportation emissions from mailing and handling invoices
 - Supporting sustainable internal operations
- This aligns with the County's environmental leadership goals.

Governance and Service Delivery

- The strategic plan calls for improving governance and service delivery across the organization.
 - Paperless AP contributes by:
 - Streamlining invoice processing and reducing delays
 - Improving accuracy through automation and digital workflows
 - Strengthening audit trails and financial controls
 - Enhancing transparency and accountability
 - This supports more efficient, reliable, and modernized internal services.

Innovation and Modernization

- The plan highlights innovation as a core value and encourages adopting modern tools to improve operations. Paperless AP aligns with this by:
 - Introducing digital automation into a traditional manual process
 - Reducing administrative burden on staff
 - Enabling data-driven decision-making through better reporting
 - This reinforces the County's commitment to innovation and continuous improvement.

Workforce and Organizational Capacity

- The plan includes ensuring the County is an inclusive, supportive Employer of Choice and aligning services with changing community needs. Paperless AP supports this by:
 - Reducing repetitive manual tasks, improving staff experience
 - Allowing remote or hybrid work through digital approvals
 - Freeing staff time for higher-value work
 - This strengthens organizational capacity and supports a modern workplace.

Positive Impacts:

- Cost savings
- Increased efficiency
- Reduced Environmental Footprint
- Improved transparency and auditability

Negative Impacts:

- Initial training and adjustment period
- Potential resistance to change
- Upfront technology investment

7. Risk Assessment

Identified Risks:

- Technology adoption challenges
- Data security concerns
- Workflow disruptions during transition

Mitigation Strategies:

- Phased implementation
- Vendor education and support
- Clear communication and training Steps to manage or reduce risks.

8. Compliance and Regulatory Review

Regulatory Requirements:

- Electronic records must comply with municipal, provincial, and federal retention and audit requirements.

Compliance Status: Not aware of any recent findings.

Legal Implications: Accounts Payable are mandatory to support all stakeholders in the organization for them to support citizens of Dufferin County

9. Stakeholder Feedback

External/Community Input:

None requested as the Accounts Payable is mandatory internal service and required to support all the departments throughout the organization.

Internal Feedback:

Larger departments such as Dufferin Oaks are looking for more efficient way of processing invoices, as they currently print all the invoices, codes, approvals and Accounting Clerk goes to pick up the invoices on a weekly basis to process them for payment.

10. Change Management

Change Management Strategy:

- Communicate benefits and timelines clearly.
- Provide training and hands-on support.
- Use pilot groups to refine processes.

Stakeholder Engagement Plan:

- Regular updates to departments and feedback through monthly meetings.

Transition Plan:

- Work with current Business Central consultant to activate the paperless module

- Customize it to the needs of county
- Test the process to make sure it is working.
- Implement it.

Municipal Program Assessment: Economic Development Function

Department/Division: Economic Development

Executive Summary

The Economic Development Division supports business retention and expansion, investment attraction, workforce development, tourism, rural and agricultural growth, and quality of place, aligned with the County's 2025–2030 Economic Development Strategy. This assessment summarizes the current delivery model, identifies key strengths and risks, and outlines potential service and budget options for Council consideration.

The document outlines the following service delivery options, with budget implications dependent on final staffing and operating decisions:

- **Option A - Reduce or eliminate services/programs:**
Budget savings: \$546,910 - personnel and operating reductions.
The operating items identified total approximately \$165K annually
Potential offsets and broader impacts, including loss/reduction of external funding such as approximately \$40K annually currently provided to SBEC, and wider economic impacts (tourism revenue, business growth, investment, workforce outcomes).
- **Option B - Alternate delivery model** (regional partnership, municipal consortium, or contracted services):
Budget savings: Potential to reduce some in-house operating costs, but may introduce new contract/administration costs and reduce local control and responsiveness; savings are not quantified in the document and depend on the scope of work being contracted and by what service provider.
- **Option C - Targeted productivity enhancements** (e.g., digital service delivery, streamlined grant administration, performance dashboards):
Budget savings: Potential to reduce contracted/operating pressure over time; savings are not quantified in the document and would require a detailed implementation plan.
- **Option D – Additional Revenue Sources**
Budget savings: Additional revenue opportunities through sponsorships and partnerships, cooperative tourism marketing, provincial and federal grants, and potential fee for- service training or workshops to help offset costs while maintaining the Economic Development function. Cost savings could be achieved by reducing operating expenses (approximately \$165K annually) or through -longer term- productivity enhancements

- **Option E – Options C&D Concurrently**

Budget savings: potential savings from targeted rescoping. Maintain a County-led economic development function while pursuing near-term productivity enhancements and external revenue opportunities (e.g., grants, sponsorships, cooperative tourism asset land development and marketed and promoted to external stakeholders and investors) to reduce pressure on the tax levy. If Council requires additional reductions, prioritize a targeted service re-scoping approach over program elimination, and return with a detailed costing model that identifies specific service changes, quantified savings, and associated risks/trade-offs.

- **Option F -Maintain current in-house delivery (status quo):**

Budget savings: None.

Department Recommendation

For the consideration of Council.

1. Current Program Overview

Program Name: Economic Development Division

Department/Division: Development and Tourism (Economic Development)

Legislative Mandate: No direct legislative mandate.

Program Description

Background

The County of Dufferin retained Watson & Associates Economists Ltd. and LEM Group to undertake an Economic and Planning Process Review in May 2025. The intent of the project was to inform County Council on the roles and responsibilities of the County as an upper-tier government in economic development and planning.

Subsequently, following this review the County retained KPMG in October 2025, to assist in data collection and analysis that will help equip the County to make evidence-based investment attraction programs and strategies to strengthen the County's competitive advantage.

During the 2026 budget process, the economic development division was identified as a service delivered by the County that should be reviewed with consideration given to eliminating the service or changing the mandate of the service.

The County economic development function was evaluated through the municipal program review, and it is the recommendation of staff to continue the function with an updated mandate. Research and analysis were conducted through the municipal program review

template that identified areas of focus for County economic development and are discussed in this report.

The division delivers programs and initiatives aligned with the 2025–2030 Economic Development Strategy, focusing on:

- Business retention, expansion, and support
- Investment attraction and investment readiness
- Workforce development and talent attraction
- Tourism development and destination marketing
- Rural and agricultural economic growth
- Quality of place and community vibrancy

How this activity supports the economic development strategy:

- Directly addresses the County's identified data gap. The Strategy notes that Dufferin's economic direction was unclear partly because stakeholders lacked reliable labour, commuting, wage, and sector data. Regular monitoring and sharing closes this gap.
- Supports the B.U.I.L.D. pillars—especially Investment Attraction and Business Retention. Investors, site selectors, and medium-sized enterprises rely on data to assess workforce availability, land readiness, and sector opportunities.
- Strengthens regional alignment. Lower-tier municipalities (Orangeville, Shelburne, Mono, etc.) each have different economic realities. Shared data creates a common foundation for coordinated planning.
- Improves workforce and housing planning. The strategy emphasizes the need to understand commuting patterns, wage disparities, and labour shortages. Ongoing data monitoring supports these long-term decisions.

Target audiences include local businesses, entrepreneurs, investors, workforce partners, educational institutions, tourism operators, agricultural producers, and residents.

Goals and Objectives

The division's goals align with the County's Strategic Plan and the 2025–2030 Economic Development Strategy:

- Strengthen business competitiveness through support programs, advisory services, and investment readiness.
- Grow and retain a skilled workforce by partnering with employers, educators, and training institutions.
- Enhance tourism by promoting Dufferin as a destination and supporting tourism operators.
- Support rural and agricultural prosperity through innovation, value-added production, and sector development.
- Improve quality of place by fostering vibrant communities, cultural assets, and amenities that attract residents and talent.

Strengths

- Strong alignment with County strategic priorities and regional economic trends.
- Established relationships with businesses, BIA, chambers, and workforce partners.
- Growing tourism brand and increased regional visibility.
- Strong agricultural base with opportunities for innovation and value-added growth.
- Increasing collaboration with education and training institutions.
- Data-driven planning supported by the new Economic Development Strategy.

Weaknesses

- Limited staff capacity relative to program scope and regional expectations.
- Lack of public transportation affects workforce mobility and business access to talent. This is in relation to the work that the ec dev team is currently doing in partnership with neighboring Counties on the transit study and being able to tap into utilization of OTIF funding.
- Lack of representation of Dufferin County on regional groups where other Counties and Regions are represented such as WOWC and the Ontario Auto Mayors Caucus. A seat is given to each member municipality that delivers ec dev and without a resourced and staff team the County would risk losing access to these groups.
- Perceived overlap of responsibilities in tourism and business retention and expansion
- Limited industrial land supply constrains investment attraction. Without a coordinated regional approach investment inquiries could be lost if a lower tier municipality is unable to land the investment.
- Tourism assets are dispersed, requiring stronger coordination and marketing.
- No Economic Development representation or support for agricultural businesses at the lower tier municipalities. Currently the SBEC operating from the Town of Orangeville does not offer business agricultural support services beyond retail service support. The County of Dufferin currently attends the OFA monthly meetings and provides County updates as well as supports OFA efforts in farm succession planning and preservation of farm land from a land use compatibility aspect while balancing interests of investment attraction.

Current Delivery Method

Programs are delivered in-house, with extensive collaboration across:

- Local municipalities
- BIA and chambers
- Workforce Planning Board
- Tourism operators
- Agricultural organizations
- Provincial and federal partners

Specialized services (e.g., branding, research, marketing campaigns) are contracted as needed.

2. Potential Changes

Option A - Reducing or Eliminating Services/Programs

Reducing economic development services would significantly impact business support, workforce development, and tourism. The division's work is foundational to economic resilience and is closely tied to Council's strategic priorities.

Eliminating the program would:

- Remove business advisory and retention services
- Reduce competitiveness for investment
- Limit workforce development initiatives
- Halt tourism marketing and sector support
- Reduce regional collaboration and grant-seeking capacity

Option B - Alternate Delivery Methods

Economic development could theoretically be delivered through:

- A regional partnership model
- Contracted services
- A local municipal consortium

However, these models reduce local control, strategic alignment, and responsiveness to County-wide needs.

Option C - Productivity Enhancements

- Digital service delivery for business support
- Enhanced data analytics and performance dashboards
- Streamlined grant administration
- Technology-enabled tourism marketing

Option D - Additional Revenue Sources

- Sponsorships and partnerships
- Tourism partnerships and cooperative marketing
- Grant funding (provincial/federal)
- Fee-for-service training or workshops

3. Key Performance Indicators (KPIs)

Current KPIs

KPIs are aligned with the 2025–2030 Strategy and include:

- Number of business engagements and advisory sessions
- Business retention and expansion outcomes
- Investment inquiries and conversions
- Workforce development partnerships and training outcomes
- Tourism visitation, spending, and operator participation

- Grant funding secured
- Marketing reach and engagement metrics

Impact on KPIs

Reducing or eliminating the program would:

- Remove all business support metrics
- Halt investment attraction activities
- Reduce workforce development outcomes
- Eliminate tourism performance tracking
- Reduce regional competitiveness

Data Collection Methods

- CRM and business engagement tracking
- Workforce and labour market data
- Tourism visitation and digital analytics
- Grant reporting
- Stakeholder surveys

4. Budget and Financial Analysis

Personnel Costs

- Manager, Economic Development and Economic Development Officer (salary and benefits \$308,000)

Operating Expenses

- Marketing/ promotional activities (approximate annual expenditure \$70K)
- Research and data tools (approximate annual expenditure \$15K)
- Tourism campaigns (approximate annual expenditure \$20K)
- Business support programs (approximate annual expenditure \$20K)
- Contracted services (approximate annual expenditure \$40K)
 - This includes development of the investment attraction strategy
- Total expenses excluding personnel costs is \$288,910
- Total net costs is \$546,910

Projected Savings (If Eliminated)

Eliminating the division would result in total savings of \$546,910 but would also:

- Reduce grant revenue (approximately \$40K given to SBEC annually for operations)
- Reduce tourism revenue and economic activity for external operators
- Limit business growth and investment
- Reduce workforce development outcomes

Cost Benefit Analysis

Economic development programs generate significant economic value through:

- Business retention and expansion
- Job creation
- Tourism spending
- Investment attraction
- Workforce development

The long term economic cost of eliminating the program would outweigh short term savings.

Support Costs

There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employees by People and Equity, Finance, IT and Procurement. As well as capital replacement of laptops, monitors, and cell phones where applicable, approximately \$1,000 per year.

5. Service Delivery Impact

Updated Service (If Reduced or Eliminated)

- No business advisory services
- No investment attraction
- No tourism development
- No workforce development coordination
- No agricultural economic support

Revised Goals and Objectives

Focus would shift from economic growth to basic administrative functions such as responding to general land inquiries, with no proactive economic development.

New Service Delivery Model

None within the County unless outsourced.

Impact on Service Recipients

- Businesses lose support and advisory services
- Employers lose workforce development coordination
- Tourism operators lose marketing and sector support
- Agricultural producers lose economic development advocacy
- Residents lose quality-of-place initiatives

Access and Equity Considerations

- Small businesses and rural entrepreneurs would be disproportionately affected

- Workforce programs supporting youth, newcomers, and underrepresented groups would be reduced
- Tourism operators in rural areas would lose visibility
- Economic disparities across municipalities could widen

6. Impact Analysis

Alignment with Strategic Goals

Economic Development strongly aligns with County priorities:

- Economic resilience
- Workforce development
- Tourism growth
- Rural prosperity
- Community vibrancy

Eliminating the program would conflict with all major strategic goals.

Positive Impacts (If Reduced)

- Short-term cost savings
- Reduced administrative workload

Negative Impacts

- Reduced business competitiveness
- Loss of investment opportunities
- Reduced tourism revenue
- Workforce shortages worsen
- Loss of regional partnerships
- Reduced grant funding
- Negative perception among businesses and investors

7. Risk Assessment

Identified Risks

- Economic stagnation or decline
- Loss of business confidence
- Reduced competitiveness for investment
- Workforce shortages intensify
- Tourism sector declines
- Reputational risk for County

Mitigation Strategies

- Maintain core economic development functions
- Strengthen partnerships with local municipalities

- Prioritize high impact programs
- Leverage external funding

8. Compliance and Regulatory Review

Economic development is not governed by a specific regulatory framework but must comply with:

- Municipal Act
- The Planning Act
- Procurement policies
- Grant requirements
- Accessibility and equity standards

No major compliance risks exist unless grant obligations are unmet.

9. Stakeholder Feedback

External/Community Input

Stakeholders consistently emphasize the need for:

- Strong business support
- Workforce development
- Tourism marketing
- Agricultural economic support

The 2025–2030 Strategy was developed with extensive consultation, demonstrating strong community support for continued investment in economic development.

**Municipal Program Assessment:
Customer Relationship Management Tool (CRM)
Zoho CRM**

Department/Division: Economic Development

Executive Summary

As part of the Municipal Program Assessment, staff reviewed the Economic Development Client Relationship Management (CRM) tool (Zoho CRM) to confirm ongoing alignment with the County's evolving role and service level, and to identify opportunities to reduce discretionary operating costs. The review found that the CRM provides value when a fully resourced Economic Development function is delivered (e.g., centralized contact management, engagement tracking, surveys/email campaigns, and reporting). However, if Economic Development services are reduced or scaled back at the County level, the advanced CRM functionality is no longer required and can be replaced with basic corporate tools for limited record-keeping needs.

Three options have been evaluated as part of this review:

- **Option 1 – Maintain Zoho CRM (status quo):**
Continue licensing (4 CRM licenses and 1 Forms license) and staff administration (estimated ~3 hours/week).
No cost savings; retains advanced tracking, automation, surveys/campaigns, and reporting.
- **Option 2 – Transition to basic corporate tools:**
Discontinue CRM-supported advanced functions and use lower-cost tools (e.g., shared databases/spreadsheets/Outlook) for basic contact management where required.
Expected savings include \$4,000/year in licensing plus approximately \$11,750/year in reduced staff administration time, with reduced ability to track detailed Economic Development KPIs.
- **Option 3 – Eliminate Zoho CRM:**
Export and archive data, then cancel/non-renew licenses. Expected savings include \$4,000/year in licensing plus approximately \$11,750/year in reduced staff administration time (as estimated in the review). This option removes the CRM platform and associated workflows, and reduces capacity for centralized engagement history and reporting should the service expand in future.

Department Recommendation:

Proceed with Option 3 (eliminate Zoho CRM) to align discretionary systems with a reduced Economic Development mandate and to realize ongoing operating savings. Prior to shutdown, staff should export and securely archive all CRM data and key reports, document core data fields/workflows for future reference, and transition any remaining contact management requirements to basic corporate tools to ensure continuity of records.

1. Current Program Overview

Program Name: Zoho CRM – Economic Development Client Relationship Management System

Department/Division: Economic Development

Legislative Mandate (if applicable): None. Use of a CRM system for economic development activities is discretionary and not legislated.

Program Description:

The Zoho CRM was implemented to support Dufferin County's Economic Development activities by centralizing business contacts, tracking engagements, managing investment inquiries, administering the future Community Improvement Plan (CIP) grants, supporting events, and improving reporting. The system was designed to modernize client management and provide data-driven insights into business support and investment attraction activities.

Goals and Objectives:

The CRM was intended to support the Economy pillar of the County's Corporate Strategic Plan and the Economic Development Dufferin BUILDS Together Strategy, by:

- Improving tracking and reporting of business engagement and support activities.
- Supporting investment attraction inquiries and pipelines.
- Administering CIP grants and related workflows.
- Enabling data-driven decision-making, performance measurement, and reporting.

Strengths:

- Centralized database for business and stakeholder contacts.
- Ability to track business engagements, inquiries, and follow-ups over time.
- Supports grant administration, surveys, forms, and reporting dashboards.
- Scalable and customizable platform used successfully by other municipalities.

Weaknesses:

- Reliant on sustained staffing levels and program delivery to generate value.
- Limited return on investment if Economic Development functions are reduced or scaled back at the County level.
- Ongoing licensing and administrative costs for a system supporting non-core or diminishing services.

- Overlap with simpler tools (spreadsheets, email, corporate systems) if advanced CRM functionality is no longer required.

Current Delivery Method:

Direct delivery: Economic Development staff use and maintain the CRM.

Contracted services: CRM development, configuration, and training provided by The Local Option using the Zoho platform.

2. Potential Changes

Areas Under Consideration:

- Elimination of the Zoho CRM system.
- Transition to basic contact management using corporate tools (e.g., shared databases, spreadsheets, Outlook).
- Discontinuation of CRM-supported functions such as advanced reporting, surveys, and automated workflows.

3. Key Performance Indicators (KPIs)

Current KPIs:

- Number of business contacts and organizations managed.
- Business engagement activities logged.
- Investment inquiries tracked.
- CIP applications and approvals processed through the system.
- Dashboard and reporting outputs.

To date, the following has been done through the CRM:

- 9 Surveys have been published with a total of about 70 responses.
- 6 email campaigns have been sent out to over 300 contacts each time.

Impact on KPIs:

Eliminating the CRM will reduce the ability to track detailed Economic Development activity metrics. However, if Economic Development services are reduced, these KPIs will no longer be required at the County level.

Data Collection Methods:

- CRM-generated reports and dashboards (historical).

Baseline Data:

Existing CRM data and reports will serve as baseline information prior to elimination and can be exported for record-keeping.

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs: Staff time required to input data, maintain records, manage workflows, and generate reports. This would be approximately 3 hours a week of staff time (\$11,750).

Operating Expenses: Licensing costs of \$4,000.

Contract Services: N/A

Annual Operating Costs:

- Zoho CRM and Zoho Forms licensing (4 CRM licenses, 1 Forms license): \$4,000 annually.

Projected Savings:

- Elimination of the CRM will result in direct annual savings of approximately \$4,000 in licensing fees.
- Additional indirect savings through reduced staff time spent on CRM administration, data entry, and reporting. This would be a total of approximately \$11,750 worth of staff time annually.

Cost-Benefit Analysis:

- Costs saved: Annual licensing fees and staff administration time.
- Benefits lost: Advanced tracking, automation, and reporting capabilities that support a full-scale Economic Development program.

Support Costs:

Limited support from IT and Communications may be required for integration or troubleshooting. Eliminating the CRM reduces reliance on interdepartmental technical support.

5. Service Delivery Impact

Updated Service: None. CRM-supported services will be eliminated.

Revised Goals and Objectives:

- Align tools and systems with a reduced Economic Development mandate.
 - Focus on economic development functions vs. inputting information into system. Rebuild relationships and work in economic development priorities at the county level such as supporting the business environment and advocating for sector-related issues at the provincial and federal levels.
- Utilize simpler, lower-cost corporate tools for basic contact management and record-keeping where required.
- Reduce overhead associated with discretionary software systems.

New Service Delivery Model: Eliminate.

Impact on Service Recipients:

- Businesses and investors will experience minimal direct impact, as CRM functionality is internal-facing.
- Any remaining Economic Development interactions can be managed through basic tools.

Access and Equity Considerations:

No direct access or equity impacts, as the CRM is not a public-facing service.

Quality Assurance Measures:

- Export and archive CRM data prior to elimination.
- Ensure continuity of records through alternative storage solutions.

6. Impact Analysis

Alignment with Strategic Goals:

The proposed elimination supports fiscal responsibility and aligns tools with the County's evolving role and priorities.

Positive Impacts:

- Direct annual cost savings.
- Reduced administrative burden on staff. Improved alignment between services delivered and systems maintained.

Negative Impacts:

- Reduced ability to generate detailed performance reports.
- Loss of a centralized engagement history if Economic Development services expand in the future.

7. Risk Assessment

Identified Risks:

- Loss of institutional knowledge if CRM data is not properly archived.
- Future costs if a CRM is reintroduced at a later date.

Mitigation Strategies:

- Export and securely store all CRM data prior to shutdown.
- Document processes and key data fields for future reference.
- Evaluate CRM needs if Economic Development services are reinstated or expanded.

8. Compliance and Regulatory Review

Regulatory Requirements: None identified.

Compliance Status: Not applicable.

Legal Implications: No legal risks associated with eliminating the CRM system.

9. Stakeholder Feedback

External/Community Input:

Not applicable. The CRM is an internal operational tool.

Internal Feedback:

Internal discussions acknowledge that the CRM provides value only when supported by a fully resourced Economic Development function.

10. Change Management

Change Management Strategy:

- Communicate internally regarding the rationale for elimination, emphasizing cost savings and alignment with service levels.

Stakeholder Engagement Plan:

- Notify internal users and IT of the planned shutdown.

Transition Plan:

- Confirm final date for CRM use.
- Export and archive all relevant data and reports.
- Cancel or do not renew Zoho licenses.
- Transition to basic corporate tools for any remaining contact management needs.
- Note: This can be done immediately if needed.

Municipal Program Assessment AI Supported Prosecution Process

Department/Division: Building Services

Executive Summary

The Prosecution Process within the Development and Tourism, Building Services Division supports enforcement of the *Building Code Act, 1992* by ensuring that Building Code violations are prosecuted in a fair, transparent, and legally defensible manner. A core component of this process is the preparation of comprehensive disclosure packages and a chronological synopsis of events, which are required under the *Provincial Offences Act* to meet disclosure obligations and support successful prosecutions.

Under the current manual preparation model, prosecution packages are assembled entirely by Building Inspectors, with oversight by the Chief Building Official (CBO). While there are minimal out-of-pocket expenses, the true cost of the program is driven by staff time, overtime, and opportunity cost.

Two options were reviewed in this assessment:

- **Option A — Maintain current manual process (status quo)**

The 2025 overtime impact (\$3,457.81) as the likely ongoing pressure.
Budget savings: None

- **Option B — Implement AI-supported process (Microsoft Copilot)**

Budget savings: \$3,457.81/year (based on 2025 overtime, assuming similar volumes)
Time savings: ~100 staff hours/year (~83%) (from ~120 hours to ~20 hours annually at ~10 files/year)

Department Recommendation:

Proceed with Option B to implement an AI-supported prosecution brief preparation process using Microsoft Copilot to reduce staff time and overtime costs while maintaining legislative compliance and oversight.

1. Current Program Overview

Program Name: Prosecution Process

Department/Division: Development and Tourism/Building Services

Legislative Mandate (if applicable): Yes

Program Description:

Preparing a disclosure package and synopsis of events is essential in any Building Code Act prosecution because it ensures the process is fair, transparent, and legally sound. Disclosure

fulfills the prosecutor's obligation to provide the defendant with all relevant information, such as inspection notes, photographs, orders, correspondence, and Inspector statements, so they can fully understand the case and prepare a defense.

Beyond meeting legal requirements, a well-organized synopsis strengthens the prosecution by supporting the prosecutor's presentation of the case and helping inspectors recall events accurately during testimony. It also demonstrates that the county acted reasonably and progressively, which is important in Building Code matters where courts expect efforts toward compliance before enforcement escalates.

Goals and Objectives:

Provide specific goals and objectives and associated plan (e.g. items that support corporate strategic plan, other long-term plan, or division work plan)

Strengths:

Areas where the program is performing well, even if reduced.

Weaknesses:

A weakness in our current enforcement process for preparing prosecution briefs under Part 3 Building Code violations is the disproportionate amount of time required to assemble the disclosure package. In particular, creating a clear and comprehensive synopsis of events has become a resource intensive step that slows the overall progression of files. This inefficiency not only delays the initiation of prosecutions but also diverts staff capacity away from other critical enforcement activities, ultimately reducing the effectiveness and responsiveness of our compliance efforts.

In April 2025, the Enforcement position was not filled following a vacancy. This was necessary due to the decline in permit revenue and building activity. This role had been dedicated exclusively to managing enforcement matters, allowing Building Inspectors to focus their time on Building Code inspections. With the removal of this position, Building Inspectors are now responsible for both enforcement activities and Building Code requirements, while still meeting all mandated Ministry timeframes. This shift has resulted in increased workloads, additional hours beyond the standard 35-hour work week, increasing inefficiencies and operational costs.

Current Delivery Method:

This process is completed internally by our Inspection staff, reviewed by the Chief Building Official before submitting to prosecution.

2. Potential Changes

Describe areas under consideration (specific programs, activities, projects to be evaluated)
Instead of staff time spent generating a synopsis of events for each prosecution file, staff will instead use AI software, such as Copilot. Copilot is free to use and will generate the synopsis of

events dramatically and reduce staff time because it eliminates the most labour intensive parts of assembling a prosecution brief. When inspection reports, correspondence, photographs, notes, and other evidentiary documents are uploaded together, Copilot can read the entire package at once, identify the sequence of events, extract key facts, and produce a coherent narrative summary in minutes. Staff no longer need to manually review each document, cross reference dates, or draft the chronology themselves, this task typically consumes 7–14 hours per file. By automating this, Copilot shifts the workload from repetitive administrative review to quick verification and refinement, allowing enforcement staff to focus on decision making, legal strategy, and progressing files more efficiently.

3. Key Performance Indicators (KPIs)

Current KPIs: A total of 10 charges were laid in 2025. Each charge requires a prosecution/disclosure package for court. Total time spent approximately 70-140 hours.

Impact on KPIs: By streamlining administrative tasks, inspection staff can redirect more of their time toward core enforcement activities. This increased operational capacity is expected to contribute to improved enforcement and compliance performance indicators, strengthening the overall effectiveness of the program.

Data Collection Methods:

Staff currently track the time required to prepare prosecution packages, often clearing their schedules to accommodate this workload. As Copilot is integrated into the process, staff will continue to monitor preparation time and record the number of inspections or enforcement site visits completed that would otherwise have been deferred or cancelled. This will help quantify the operational efficiencies gained through the use of Copilot.

Baseline Data:

In 2025, Building Services prepared 10 prosecution packages, each requiring between 7 and 14 hours to assemble manually. This resulted in a total workload of approximately 70 to 140 staff hours (average 105 hours), representing 2 to 4 full workweeks of inspector time. This workload contributed to \$3,457.81 in overtime expenditures and reduced the division's capacity to complete inspections and enforcement activities within regular working hours.

4. Budget and Financial Analysis

Current Budget Breakdown:

While this work requires substantial staff time, it has minimal direct impact on the division's budget, as it generally does not generate additional operational expenses. Although in 2025 \$3,457.81 in overtime was paid to accommodate the preparation of these packages, this amount represents a relatively minor budgetary impact in the context of overall program expenditures.

- Each prosecution package takes 11 hours on average for Inspectors and 1 hour on average for the Chief Building Official.
- In 2025 Inspectors completed 10 packages, averaging a total time of 110 hours of Inspection staff time and 10 hours of the CBO's time.
- Total average hours spent in 2025 120 hours, which equates to approximately \$10,000 in staff time

Projected Savings:

It is projected to save on overtime hours spent completing this task. Last year we spent \$3,457.81, therefore, if we were to repeat 2025 this year but using AI to complete this task, we would save that amount as well as approximately \$8,000 in staff time.

Cost-Benefit Analysis:

This proposed approach is expected to generate both time and cost efficiencies, strengthening the division's capacity to manage and advance prosecution files effectively. The enforcement position was eliminated in 2025, by proceeding with an AI tool for enforcement purposes, a substantial portion of the duties under the enforcement position can be fulfilled using the current inspection staff.

Support Costs:

No interdepartmental support is required for this program.

5. Service Delivery Impact

Updated Service:

- Moving ahead with this change in process, our Inspectors will scan evidence, reports and documents into one PDF package that will be uploaded to Copilot to generate a prosecution briefing in chronological order. When testing this method, it took approximately 10 seconds to generate the briefing, versus 7 to 14 hours.

New Service Delivery Model:

- This will still be a direct service, using free AI software.

Impact on Service Recipients:

- The Inspection staff will be positively impacted by this change, by freeing up their time to continue with regular enforcement and building code matters.

Access and Equity Considerations:

- This will not adversely impact any groups or exclude any individuals.

Quality Assurance Measures:

- Service quality will be maintained through a structured transition process that ensures accuracy, consistency, and legal defensibility.
- Building Inspectors will continue to collect and verify all evidentiary materials, while Copilot will be used solely to automate the assembly and summarization of information.

- The Chief Building Official will retain responsibility for reviewing all prosecution briefs prior to submission.
- This layered approach preserves professional oversight and ensures that the transition to AI-assisted preparation does not compromise evidentiary standards or procedural fairness.

6. Impact Analysis

Alignment with Strategic Goals:

The proposed change supports several municipal and corporate priorities, including:

- Operational efficiency and modernization through the adoption of digital tools.
- Improved service delivery by reducing administrative burdens on technical staff.
- Financial sustainability by lowering overtime costs and optimizing staff time.
- Regulatory compliance by ensuring timely and accurate preparation of prosecution materials.

Positive Impacts:

- Expected benefits (e.g., cost savings, increased efficiency).

Significant time savings:

- Reducing preparation time from 7–14 hours per file to seconds.

Cost savings:

- Eliminating overtime expenditures associated with prosecution package preparation.

Enhanced staff capacity:

- Inspectors can redirect time toward inspections, enforcement, and compliance monitoring.

Improved consistency:

- AI-generated summaries reduce human error and ensure standardized formatting.

Faster progression of enforcement files:

- More timely prosecutions support stronger compliance outcomes.

Negative Impacts:

- Drawbacks or challenges (e.g., reduced service levels, staff reductions, community backlash).

Initial learning curve:

- Staff will require time to become comfortable with the new workflow.

Dependence on technology:

- Reliance on AI tools introduces a risk if the platform becomes unavailable.

Perception concerns:

- Some stakeholders may question the use of AI in legal processes, requiring clear communication about oversight and verification.
- Consultation with the county's prosecutor would address this.

7. Risk Assessment**Identified Risks:**

- Financial, operational, reputational, or other risks associated with change.

Financial Risk:

- Minimal; the primary risk relates to potential overtime if the new process is not adopted.

Operational Risk:

- Possible delays if AI tools are temporarily unavailable or if staff require additional training.

Reputational Risk:

- Misunderstandings about AI use in legal processes could lead to concerns about accuracy or fairness.

Legal Risk:

- If summaries are not properly reviewed, there is a risk of incomplete or inaccurate disclosure.

Mitigation Strategies:

- Steps to manage or reduce risks.

Manual Reviews:

- All AI-generated summaries will be reviewed by Inspection staff and reviewed and approved by the Chief Building Official. This ensures that the final prosecution brief accurately reflects the evidence, complies with disclosure obligations, and maintains the integrity required for legal proceedings.

Staff training:

- Inspectors will receive guidance on preparing evidence packages for AI processing.
- A step-by-step guide will be incorporated into the existing legal procedures manual.

Redundancy:

- Staff will continue to have the ability to prepare summaries manually when necessary.
- The skills developed through existing procedures ensure they can still produce these summaries without relying on AI, maintaining operational resilience.

Clear documentation:

- Internal procedures will outline how AI is used, reviewed, and validated.

- This also strengthens defensibility by demonstrating that the county follows a structured, transparent process.

Communication strategy:

- Communication efforts will focus on ensuring that staff clearly understand the new workflow, the purpose of integrating AI into the prosecution process, and the safeguards in place to maintain accuracy and legal integrity.
- Staff will receive guidance on how AI supports administrative efficiency while reinforcing that professional judgment, evidence review, and final approval remain human-led responsibilities.
- Regular internal updates will be provided to address questions, share best practices, and ensure consistent application of the revised process across the division.
- In addition to staff-level communication, periodic reporting will be provided to the Director of Development and Tourism to monitor implementation progress, operational impacts, and efficiency gains.

8. Compliance and Regulatory Review

Regulatory Requirements: List of all applicable municipal, provincial, or federal regulations.

- Building Code Act, 1992 - The *Building Code Act, 1992* establishes the legal authority for municipalities to enforce building standards, issue orders, conduct inspections, and initiate prosecutions. The Act authorizes municipalities to initiate prosecutions for non-compliance. This includes preparing disclosure materials, maintaining evidentiary integrity, and ensuring procedural fairness.
- Ontario Building Code - The *Ontario Building Code* sets out the technical requirements for construction, renovation, and demolition. While the OBC is primarily technical, it imposes several obligations that directly affect enforcement and prosecution. Any prosecution must be supported by documentation that clearly demonstrates which OBC provisions were violated and how those violations were identified. The OBC requires consistent application of technical standards, making clear, well-organized prosecution briefs essential for demonstrating that enforcement actions were justified and technically sound.
- Provincial Offences Act - The *Provincial Offences Act* governs the legal process for prosecuting Building Code Act offences. It establishes strict requirements for disclosure, evidence handling, and procedural fairness. Prosecutors must provide defendants with all relevant information, including inspection notes, photographs, orders, correspondence, and witness statements. Failure to provide complete disclosure can result in delays, adjournments, or dismissal of charges. Disclosure packages must be organized, chronological, and comprehensive to ensure the defendant can understand the case and prepare a defense.

- MFIPPA - This legislation ensures that any documents containing personal information, such as inspection notes or photographs are managed securely and with respect for privacy rights.

Compliance Status:

The current process complies with all legislative requirements. The proposed change does not alter legal obligations; it only changes the method of preparing summaries. All evidentiary materials remain collected, stored, and reviewed by qualified staff.

Legal Implications: Are there legal risks or obligations if the program is reduced or eliminated?

There are no legal risks associated with reducing manual administrative work. However:

- The County must ensure that AI-generated summaries accurately reflect the evidence.
- Staff must continue to meet disclosure obligations under the Provincial Offences Act.
- Failure to review AI-generated content could expose the municipality to procedural challenges.

With appropriate monitoring, the proposed change enhances compliance by increasing both accuracy and efficiency.

9. Stakeholder Feedback

External/Community Input:

Community input from residents is not required for this internal administrative process. Because the public is not directly affected by internal workflow changes, the improved enforcement timelines may instead help reinforce confidence in the Building Services.

Internal Feedback:

- Input from department heads, program staff, and other internal stakeholders.

Inspectors:

- Supportive of the change due to the significant reduction in administrative workload.

Management:

- Recognizes the operational and financial benefits, particularly in light of the elimination of the Enforcement position.

Corporate leadership:

- Supportive of modernization efforts that align with broader digital transformation goals.

10. Change Management

Change Management Strategy: Outline how reduction/elimination will be communicated and managed.

The transition will be managed through a phased approach:

- Apply the 3 P's:
 - Phase 1 – Prepare Approach: Define Success, Define Impact, Define Approach
 - Phase 2 – Manage Change: Plan and Act, Track Performance, Adapt Actions
 - Phase 3 – Sustain Outcomes: Review Performance, Activate Sustainment, Transfer Ownership
- Outline the Critical Elements of Success
 - Clear reason for change including benefits and objectives
 - Leadership/Sponsorship - governance and direction
 - Project Management – Technical side (time, cost, scope, design. Develop, deliver)
 - Change Management – People side (individual engagement, adoption, usage for organizational success)
- Introduce the new workflow.
- Provide staff training on preparing evidence packages for AI processing.
- Implement a review protocol to ensure accuracy.
- Monitor performance and adjust procedures as needed.
- Communication will emphasize that AI is a tool to support, not replace professional judgment.

Stakeholder Engagement Plan:

- How stakeholders will be informed and involved throughout the process.

Internal staff:

- Training sessions, workflow guides, and opportunities for feedback.

Management:

- Regular updates on efficiency gains and operational impacts.

Council:

- Reporting through the Municipal Program Review process.

Prosecutor:

- Ongoing coordination to ensure AI-generated summaries meet disclosure standards, support prosecutorial needs, and maintain legal integrity throughout the transition.

Transition Plan:

Steps for winding down or transferring services, including timelines and responsible parties.

- Step 1: Develop internal procedures for AI-assisted prosecution brief preparation and incorporate it into our existing legal procedures manual.
- Step 2: Train inspection staff on scanning, organizing, and uploading evidence packages.
- Step 3: Begin using AI for new prosecution files while maintaining manual capability as backup.
- Step 4: Conduct quality checks on initial cases to validate accuracy.
- Step 5: Fully transition to the new model once consistency is confirmed.

Responsible Parties:

- Chief Building Official and Building Inspectors

Timeline:

- Implementation can begin immediately, with full adoption expected within one to two months.

Municipal Program Assessment: Museum of Dufferin – Archives

Department/Division: Museum of Dufferin

Executive Summary

This review assesses the County of Dufferin Archives program (Museum of Dufferin) with a focus on service sustainability, modernization opportunities, and budget pressures. The Archives continue to play a key role in preserving and providing access to municipal and community records; however, demand for staff-supported research services has declined in recent years (83 research requests in 2025).

Three options are presented as part of this review:

- **Option A - Maintain current service model (status quo).**
Continue current levels of in-person and staff-supported research services; no service elimination is proposed at this time.
Budget savings: None identified (ongoing cost pressures remain).
- **Option B - Remove Archivist, Assistant Curator, and Archive Student Role and create Collections Specialist Role.**
Combine archive services and collections management into one role to reduce staffing costs while maintaining core preservation and access functions.
Budget savings: Up to \$92,450 annually (primarily through removal of one permanent FT position, one permanent PT position, and a summer student position, as detailed in the budget section).
- **Option C: Implement productivity enhancements through technology (portal migration).**
Complete the migration from the legacy Dufferin Archives portal to Past Perfect and Our Digital World to improve digital access and reduce reliance on the legacy system.
Budget savings: \$10,000 annually in hosting costs, expected after implementation (target completion: end of April 2026).

Department Recommendation:

Proceed with Option C – the technology migration as planned to capture the near-term \$10,000 savings while protecting public access and data integrity. In parallel, advance planning for the archives/collections consolidation to realize up to \$92,450 in annual savings, with mitigations to manage service impacts (e.g., cross-training, appointment-based research support, prioritization of municipal records needs, and clear communication of revised service

levels). Monitor research response times, service usage, and stakeholder feedback during the first year and adjust workflows as required.

3. Current Program Overview

Program Name: County of Dufferin Archives

Department/Division: Development and Tourism/Museum of Dufferin

Legislative Mandate (if applicable): No

Program Description:

The County of Dufferin Archives preserves, manages, and provides access to documentary heritage relating to Dufferin County and its municipalities. The Archives maintains municipal records transferred from local municipalities, as well as privately donated materials such as photographs, maps, documents, newspapers, and other research resources. These records are preserved to support government accountability, historical research, genealogical inquiries, and community heritage initiatives.

The Archives also assists municipal clerks with records management and retention processes and provides research services to residents, students, historians, and other researchers. They are often called upon by local media for stories related to specific days/months of note (ex. Black History Month) or are asked to provide specific settlement information that may be used in everything from genealogy research to legal proceedings.

Goals and Objectives:

- Preserve and protect archival records documenting the history and governance of Dufferin County.
- Ensure long-term preservation and accessibility of municipal records and community heritage materials.
- Provide research support and public access to archival resources for residents, researchers, and municipal partners.
- Support municipal compliance with records retention policies and archival best practices.
- Increase digital access to archival materials to improve discoverability and reduce barriers to research.
- Run workshops that are both engaging and educational related to archive services
- Conducting talks, off-site outreach events, and assisting with local history inquiries.

Strengths:

- Holdings of all Municipal Records with specialized training on managing this type of record.
- Strong local history and collections knowledge – The current Archivist has been working with the museum for over 15 years and has extensive knowledge of the history of Dufferin

County as well as institutional knowledge of the museum and its evolution over the years. This allows for faster processing time of research requests and inquiries.

Weaknesses:

- Decline in archive research requests – The Archives has experienced a general decline in research requests over a period of years as well as a decline in the number of people using the archive research services. In 2025, the number of research requests was 83 and the number of researchers was 583.
- Antiquated Archive Research Portal – Over the last three years we have been working to move information off the Dufferin Archives portal into Past Perfect to save \$10,000 on the annual hosting fee. We are close to transitioning off this platform, but to maintain service delivery and not lose data, it has taken time to make the switch.

Current Delivery Method:

- The Archives offers in-person research, personalized research help, and works with all clerks’ departments in all Dufferin County Municipalities to manage their municipal record collections, which are stored here at the Museum.
- Research is often requested via phone, email, or in person and the Archivist assists with either directing researchers where to look for sources or provides them with sources.

2. Potential Changes

Reducing or eliminating services/programs

We are not proposing removing this service completely at this time.

Providing services using an alternate delivery method

Archive services amalgamated into collections management – One option is to combine archive services and collections management into one role, a Collections Specialist.

- This would consolidate resources and remove one part-time permanent position, one full-time permanent position and one summer student position and replace them with one Collections Specialist role.
- This would be the easiest solution to save significant annual operating costs without disrupting the delivery of museum services.

Implementing productivity enhancements through process redesign and/or technology

- **Moving Digital Archives to Past Perfect and Our Digital World** - \$10,000 in annual savings by moving information to our digital collections management platform (Past Perfect) and a more cost-effective digital newspaper hosting software (Our Digital World) – this is currently in progress and set to be complete by the end of April 2026.

3. Key Performance Indicators (KPIs)

Current KPIs:

- The Archive houses 9,361 photographs; 11,723 Archive records; and 4,011 library books = a total of 25,095 objects
- The Archives performed 83 research requests in 2025
- The Archives saw 583 visitors last year
- There were 1,096 archive records added to the public research portal in 2025
- Research Services fees in 2025 totaled \$1,546

Impact on KPIs:

- **Archive amalgamation** – would minimally affect the KPIs for attendance but would increase research wait times and reduce service hours for archive services.

Data Collection Methods:

- We collect data using the reporting of our Shopify portal which records all our monetary transactions, bookings, and attendance.
- We use surveys to collect information about visitors, their satisfaction with our programs and events, and information on areas to improve.

4. Budget and Financial Analysis

Personnel Costs:

- Archives staff include the Archivist and one summer student, \$160,500

Operating Expenses:

- Archive operating expenses = \$3,600
- Digital Archives Platform - \$10,000
- Past Perfect - \$570

Contract Services: None

Capital Expenditures:

- High Resolution Scanners - \$16,000 each

These two scanners support digitization efforts, preservation of fragile materials, and improved digital access for researchers. This also allows us to do much of the Digital Archives migration in-house instead of hiring a company to digitize the newspapers on microfilm and upload to the new platform. There is currently \$25,000 in the capital budget to replace these in 2026.

Projected Savings:

Total projected savings from Archives & Collections Consolidation= \$92,450

- Elimination of Archives staff and Assistant Curator, \$230,650 offset by addition of new Collections Specialist \$138,200
- Savings will also be realized through support costs

Total savings from implementing productivity enhancements through process redesign and technology = \$10,000

- Digital Archives - \$10,000 saved

Cost-Benefit Analysis:

Consolidating archives and collections together would generate significant operational savings while maintaining the core preservation and access functions of the archives. The consolidation would reduce staffing costs by eliminating one permanent position and a summer student position, resulting in estimated annual savings of \$92,450. In addition, transitioning Digital Archives from the legacy portal to Past Perfect and Our Digital World will reduce ongoing hosting costs by approximately \$10,000 annually.

While this restructuring would maintain basic archival preservation and municipal records management responsibilities, it may result in reduced service hours, slower response times for research inquiries, and decreased capacity for digitization projects. Overall, the financial savings are substantial, but the reduction in dedicated archival staffing may affect service responsiveness and long-term archival development.

Support Costs:

There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employees by People and Equity, Finance, IT and Procurement. As well as capital replacement of laptops, monitors, and cell phones where applicable, approximately \$1,000 per year.

5. Service Delivery Impact

Updated Service:

Archival services would continue to be offered but would be integrated into a consolidated collections management role responsible for both museum collections and archival materials.

Revised Goals and Objectives:

- Maintain preservation of municipal and community archival records.
- Ensure continued public access to archival materials through in-person and digital research services.
- Improve operational efficiency by integrating archival and collections management functions.
- Prioritize digitization and digital accessibility to improve self-guided research access.

- Refocus on core collections management activities, removing workshops, outreach, and public talks to reflect new staffing structures and needs.

New Service Delivery Model:

Under the revised model, archival responsibilities would be incorporated into a collections management role. Research assistance would continue to be provided through scheduled appointments, email, and phone inquiries, but service hours may be reduced. Digitization initiatives and cataloguing would continue but may progress at a slower pace due to reduced dedicated staffing.

Impact on Service Recipients:

- Continued access to archival materials and research services.
- Potentially longer wait times for research responses and appointments.
- Reduced staff availability for research requests.
- Increased reliance on digital access tools and self-directed research
- Removal of popular archive workshop series and archive outreach activities

Access and Equity Considerations:

Digital access improvements through Past Perfect and online platforms may increase accessibility for researchers who cannot visit the museum in person. However, reduced staffing would impact individuals who rely on guided research assistance, including seniors, students, and individuals unfamiliar with archival research methods. Efforts should continue to prioritize accessible digital resources and clear research guidance materials.

Quality Assurance Measures

- Continued adherence to archival preservation standards and collections management policies.
- Monitoring research response times and service usage to assess service impact.
- Maintaining accurate cataloguing and digital records within Past Perfect.
- Ongoing evaluation of user feedback through surveys and research inquiries.

6. Impact Analysis

Alignment with Strategic Goals

The proposed changes align with the County's goals of fiscal responsibility, operational efficiency, and modernization of services through technology. Consolidating roles and transitioning to digital platforms supports cost containment while maintaining essential heritage preservation services.

Positive Impacts

- Significant operational cost savings.

- Improved integration of archival and collections management functions.
- Increased digital access to archival materials.
- Reduced reliance on outdated and costly technology platforms.

Negative Impacts

- Reduced dedicated archival staff capacity.
- Delays in responding to research inquiries.
- Slower progress on digitization and cataloguing projects.
- Reduced availability of specialized archival expertise.

7. Risk Assessment

Identified Risks

- Loss of specialized archival expertise due to staff reductions.
- Reduced service capacity will impact researcher satisfaction.
- There will be an increased backlog in archival/collections cataloguing and digitization work.
- There will be a decrease in productivity of collection inventorying and deaccessioning
- Municipal partners will experience slower support for records management inquiries.

Mitigation Strategies

- Provide training in archival management, particularly in municipal records management for Collection Specialist.
- Prioritize high-demand research requests and municipal records needs.
- Continue digitization efforts to increase self-service access to materials.
- Maintain clear service timelines and communication with researchers and municipal partners.

8. Compliance and Regulatory Review

Regulatory Requirements N/A

Compliance Status N/A

Legal Implications: No

9. Stakeholder Feedback

Stakeholder Engagement Plan

Internal Communication

- Inform museum staff, volunteers, and County administration of the proposed changes and implementation timeline.
- Provide clear guidance regarding revised roles, responsibilities, and service procedures.

- Ensure staff have access to updated policies, procedures, and documentation.

External Communication

- Notify municipal clerks and partner municipalities of any operational changes that may affect records management support.
- Communicate changes in research services, service hours, or response timelines to the public.
- Provide clear information on how researchers can access materials through digital platforms or appointment-based services.

Internal Stakeholders

- Museum staff and management – as this will restructure/change three permanent positions at the museum to accommodate, it would be necessary to engage museum staff in the process.
- Municipal clerks and records management staff – this change will reduce the capacity for municipal records management until staff have been properly trained and familiarized with this new element of the role combining archives and collections together.

External Stakeholders

- Program Participants and General Public - Researchers and genealogy users will be informed of any changes to research hours, response times, or appointment procedures.
- Community Partners - Local libraries, researchers, and community heritage organizations will be informed of service changes and encouraged to utilize digital access tools.
- Archive Volunteers – There are four regular volunteers that come in for a full day each Wednesday to donate their time to the archives. Some have been volunteering with the museum for around 30 years.

10. Change Management

Change Management Strategy

Phase 1: Technology Transition

- Complete the migration of digital archival records from the legacy Dufferin Archives portal to PastPerfect and Our Digital World.
- Ensure all archival data is securely transferred and verified to prevent data loss.
- Maintain public access to digitized materials during the transition period where possible.
- Eliminate the annual website hosting cost associated with the legacy system.

Phase 2: Role Consolidation and Workflow Integration

- Integrate archival responsibilities into the broader collections management function.

- Develop clear workflows outlining responsibilities for:
 - Archival preservation and storage
 - Records management support for municipal partners
 - Cataloguing and documentation
 - Research assistance and reference services
- Document existing archival procedures and processes to preserve institutional knowledge.
- Provide cross-training to ensure staff responsible for collections management have the necessary skills to manage archival materials appropriately

Transition Plan

- Complete migration of archival data to PastPerfect and Our Digital World.
- Develop revised workflows integrating archival and collections management responsibilities.
- Communicate new research service procedures and timelines to the public.
- Monitor service levels and research request volumes during the first year following implementation to assess impacts and adjust processes if necessary.

Service Continuity Measures

- Maintain secure storage and preservation of all municipal and community archival records.
- Continue to provide research support through email, phone, and scheduled in-person appointments.
- Prioritize requests related to municipal records, legal inquiries, and time-sensitive research.
- Increase reliance on digital tools to support self-directed research whenever possible to reduce staff time for public research requests.

IN ONTARIO'S RURAL COMMUNITIES, **MUSEUMS SUPPORT:**

✦ **Economic Development**

- Museums help attract skilled workers¹ & visitors⁹ and renew downtowns²

✦ **Tourism Growth**

- Museums are key assets for developing Ontario's rural tourism^{7,8}
- Ontario museums welcome 7.5 million visits by tourists every year^{3,9}
- Museum visitation in Ontario has grown 12% in two years⁹
- Cultural tourists, on average, spend twice as much and stay a night longer¹⁰

✦ **Local Education**

- Museum visits build higher achievement and skills in reading, math, science, and critical thinking, especially for rural students^{5,6}
- 77% of Ontario museums offer programs linked to provincial curriculum³
- Digital experiences link museums and schools³

✦ **Community Identity & History**

- 2/3 are Community Museums, dedicated to local stories and history³
- Rural museums are key amenities for community pride and rural culture⁴

✦ **Senior Vitality**

- 45,000 Ontario seniors take part in specialized museum programs each year³
- Museum programs combat social isolation and build senior well-being¹¹
- Ontario's 37,000 museum volunteers contribute 2.5 million hours a year⁹

IN ONTARIO'S RURAL COMMUNITIES,

museums, galleries, & heritage sites
help create distinct & vibrant places to
live, work, visit, & invest

About the Ontario Museum Association

The OMA is the professional association representing the more than 700 museums, galleries, and heritage sites across Ontario.

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Sources:

1. Policy Statement on Social-Economic Development. Federation of Canadian Municipalities, March 2016.
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9. *Government of Canada Survey of Heritage Institutions: 2019*. Department of Canadian Heritage, 2020.
10. *Ontario Arts and Culture Tourism Profile*, by Research Resolutions & Consulting Ltd. for Ontario Arts Council, November 2012.
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Museums and Your Municipality

MUSEUMS, GALLERIES, AND HERITAGE SITES:

✦ help create a sense of place

Cultural institutions are a part of what defines a community's **unique identity**¹.

- **43%** of Ontario's museums are in a designated heritage structure²

✦ supplement school curriculum

- More than **2 million** visits are made every year by Ontario children on school trips²
- **77%** of museums in Ontario offer programs linked to provincial curriculum requirements²

✦ support healthy, active seniors

Activities like museum programs contribute to **social participation** and **senior well-being**⁹.

- More than **45,000 seniors** participate in special museum programs across the province annually²

✦ preserve and promote local stories ✦ attract cultural tourists

- **2/3** of Ontario museums focus primarily on **local community & history**²
- **52%** of museum collections in Ontario contain more than 10,000 objects which reflect their local community's population and industry²

- Ontario's museums see more than **7.5 million** visits by tourists annually²
- Cultural tourists spend **twice as much** per visit as typical tourists³

✦ promote skill-building and learning

Heritage institutions play a role in shaping and **encouraging young people** in their communities⁸.

- **90%** of Ontario's museums provide training and professional development for staff and volunteers²

✦ contribute to vibrant and vital communities

Museums are invested in the well-being of their communities, with **half** partnering with other organizations and **54%** actively contributing to local cultural planning²

- **55%** of museum visits in Ontario are by local residents²
- More than **750,000 participants** join museum activities in Ontario every year²

Museums, galleries, and heritage sites are found across every region of the province. That means there are more than 700 institutions in Ontario that are committed to their local community and economy.

As the largest government funder for most of Ontario's smaller museums (annual revenues less than \$2 million)², municipalities create value in their communities through the work of their museums.

Museums and Your Municipality

With Municipal Support, Museums, Galleries, and Heritage Sites CAN:

✦ revitalize downtown areas

- 83% of Ontario mid-size cities found cultural and recreational amenities effective in their work to renew their downtown⁵
- 88% of Ontarians see arts and cultural activities as important to local economic well-being⁴

✦ enhance feelings of belonging

Ontarians agree that culture:

- Brings people from diverse backgrounds together as a community (90%)⁶
- Helps define what it means to be Canadian (86%)⁶

✦ improve local quality of life

- 92% of Ontarians agree that exposure to arts and culture is important to individual well-being⁴
- 86% of Ontarians attend a live arts and culture event at least once per year⁴

✦ attract and retain a skilled workforce

- “Arts, culture and heritage improve the ability of municipal governments to **influence local economic development** by attracting and retaining a skilled and talented workforce.”⁷

Sources:

1. *Museums, Community and Urban Heritage*, William Logan, *Queensland Review* Vol. 12, No. 1, 2005.
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5. *Downtown Revitalization Strategies in Ontario's Mid-Sized Cities: A Web-Survey and Case Study*, by Christopher Lauder, (Masters' Thesis) University of Waterloo, April 17, 2010.
6. *Impressions of the Impact of the Arts on Quality of Life and Well-Being in Ontario: Ontario Arts Council Survey Findings*, by Nanos Research for the Ontario Arts Council, March 2017.
7. *Policy Statement on Social-Economic Development*, Federation of Canadian Municipalities, March 2016.
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9. *Social participation and the health and well-being of Canadian seniors*, Research article, Heather Gilmour, *Statistics Canada Health Reports*, Vol. 23, No. 4, December 2012.

ONTARIANS VALUE MUSEUMS

88% of Ontarians agree that arts and culture add value to their community⁶

Volunteers across the province contributed more than **2.5 million hours** to museums, art galleries, and historic sites in 2017.⁸

About the Ontario Museum Association

The OMA is the professional association representing the more than 700 museums, galleries, and heritage sites across Ontario.

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TELLING THE TRUTH: TRUSTWORTHINESS, LEARNING, AND SHARING AUTHORITY

A Museums for Me data story

At a time when confidence in public institutions is becoming increasingly tenuous, museums continue to hold the trust of Canadians. Research affirms that the public continues to value museums as trustworthy sources of information. Even people who identify as non-visitors trust museums.

Museums are a highly credible source of information

80%
(NON-VISITORS: 65%)

Daily newspapers are a highly credible source of information

48%

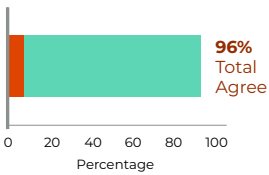
Television is a highly credible source of information

33%

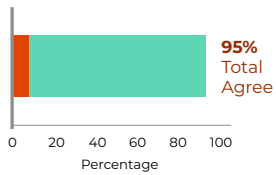
The Canadian public's trust in museums is connected to their role as institutions that preserve objects and stories, and provide access to learning and information. Museums preserve tangible and intangible heritage, and allow visitors to learn about our shared past. **93% OF RESPONDENTS** agree that museums spark curiosity, provoke wonder, and promote creativity and a 'love of learning'!

■ Somewhat Agree ■ Strongly Agree ■ Total Agree

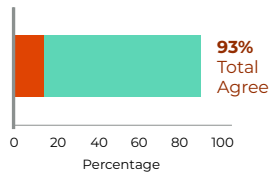
The museum is a place to learn and be inspired.



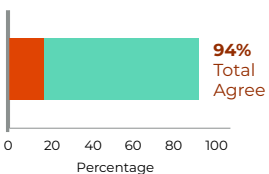
The museum is a place to preserve and care for art and objects, and to tell their stories.



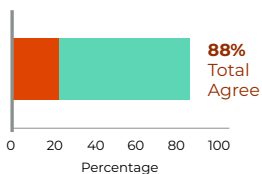
Museums help me understand other cultures and communities.



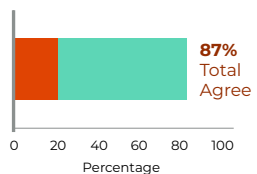
Museums help visitors and tourists explore a region or place.



Museums give us information and perspective on important cultural and social issues.



Museums advance knowledge as research institutions.



Canadians expressed appreciation for the opportunity to learn from preserved objects. As one respondent put it, "museums taught me about new ways to communicate. They taught me the value of objects as messages from other times or places."

"Museums preserve common inheritances. They keep objects and archives as historical evidence."

– SURVEY RESPONDENT

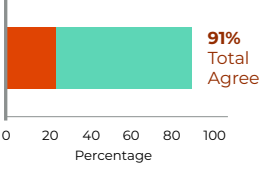
HOW IMPORTANT ARE THE FOLLOWING TO YOUR OVERALL MUSEUM EXPERIENCE?

When asked to rate the importance of various aspects of a museum visit, Canadians rated exhibits, collections, and programs as the most important aspects of their visitor experience.

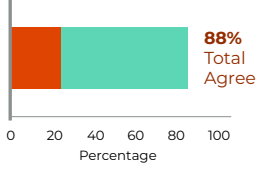
88% OF RESPONDENTS listed the relevance and quality of the exhibits as the number one consideration before planning a visit to the museum, whereas amenities like gift shops, restaurants, and event spaces were of secondary importance. Visitors come to museums to learn and feed into their curiosity in creative ways through the exhibits and objects presented to them.

■ Somewhat Agree ■ Strongly Agree ■ Total Agree

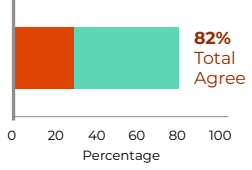
New, changing or temporary exhibitions



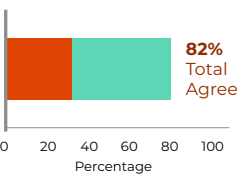
The museum's permanent collection



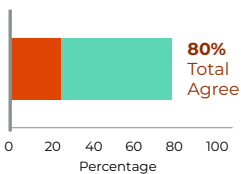
Special touring exhibitions



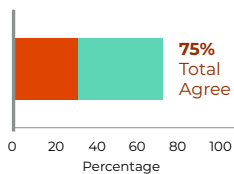
Learning programmes (demonstrations, docent talks)



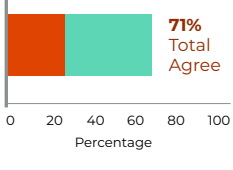
Activities for children (interactive exhibitions, discovery programming, day-camps)



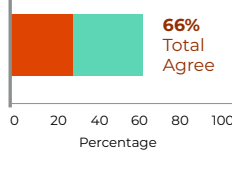
Special events (Open-Doors events, festivals, etc.)



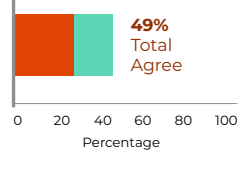
Places to sit



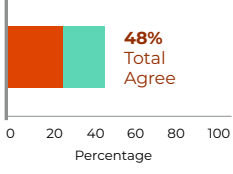
Museum tours



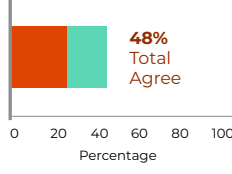
Places to shop (shops and kiosks)



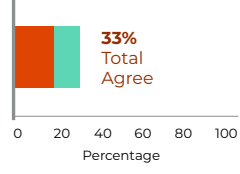
Membership benefits



Places to eat (cafes, restaurants or snack-bars)



Spaces for events (wedding, birthdays, corporate events, etc.)



Trust and authority are also connected to the ability of the museum to share multiple perspectives. Canadians want museums to share interesting stories that represent their lived experiences. They want museums to engage them in the process of designing exhibits and programs. Sharing authority allows museums to provide a platform for the community to be the storytellers and share their own perspectives.

For more see *Getting to Relevance Through Accessibility and Representation*

Community members should be involved in designing material and exhibits for museums.

49% Agree

I think museums should have dialogues with local communities to develop programs that resonate with community members.

58% Agree

Local museums can be a place to engage with the community.

68% Agree

Local museums, in particular, can be a place to engage with the community and explore community-driven narratives. Nearly **1 in 3 RESPONDENTS** want to participate in a brainstorming or engagement session with a museum, and **1 in 4** would like to volunteer with a museum. Museums can cultivate trustworthiness through community engagement efforts such as dialogue sessions or embedding community members into the museum through volunteering opportunities, board participation, and membership.

The perception that museums are places for dialogue, to participate, to ask questions, and to seek out differing views all contribute to the trustworthiness of the institution. Museums can build on their trustworthiness by continuing to collaborate with community, share authority, and encourage the exploration of ideas.

"Museums are for perspective, to widen our worldview and build historical consciousness."

"[Museums] take me beyond my own experience" and "are a place for dialogue on issues."

– SURVEY RESPONDENTS

All data collected as part of a 2021 national survey, *Museums for Me*, undertaken as part of *Reconsidering Museums*. For detailed information on questions and responses, see the [Museums For Me: Engaging Canadians on the Future of Museums – What We Heard report](#).

The Alberta Museums Association gratefully acknowledges the financial support of the Government of Canada through the Canada Cultural Investment Fund and the Province of Alberta through the Community Initiatives Program for the *Reconsidering Museums* project.



Municipal Program Assessment: Museum of Dufferin Dissolution

Department/Division: Museum of Dufferin

Executive Summary

This review assesses the Museum of Dufferin's service delivery and financial footprint, with a focus on options to address budget constraints while considering operational, legal, and community impacts. The analysis highlights that the museum delivers measurable community value (education, tourism, heritage preservation and outreach) and has recently improved performance (attendance, revenues and external funding). Options were evaluated based on net financial impact (including foregone revenues and funding), feasibility, risk, and alignment with County strategic priorities.

- **Option A – Dissolve/close the Museum of Dufferin (cease operations)**
Budget savings: \$1,342,575/year through elimination of personnel and operating costs.
Key considerations: While this option reduces the ongoing operating budget, it does not reflect significant short- and long-term dissolution costs (e.g., staff time for cataloguing, deaccessioning, transportation, storage, and disposal of 48,000+ artefacts and heritage structures) and would likely reduce near-term savings. It would also result in the loss of grants, donations, earned revenues (programming, rentals, retail), and endowment interest dedicated to museum operations, along with substantial reputational, legal/compliance, and community impact risks.
- **Option B – Maintain operations and mitigate fiscal pressure through revenue growth and service optimization**
Budget savings: partial offset/revenue potential.
Estimated annual offset/revenue potential: partial offset through expanded rentals and commercial filming, continued fundraising growth, and endowment interest of ~3–4% on \$750,000 annually (net of management fees).
Key considerations: This option preserves core community benefits and avoids the irreversible impacts of collection dispersal. It also maintains eligibility for external grants and the ability to generate earned revenues, while allowing Council/Staff to pursue targeted operating adjustments, partnership opportunities, and a transparent engagement process to guide any future service-level decisions.

Please keep in mind the above dollar figure is an estimated value based on past records of grants received and potential for fundraising and sponsorship.

Department Recommendation:

Proceed with Option B as the preferred path at this time. Although Option A presents an estimated \$1.3M in annual operating savings, the review identifies substantial unquantified dissolution costs, loss of external funding and earned revenues, and significant reputational/legal risks that could materially reduce net savings while creating permanent cultural and service impacts. Maintaining operations while strengthening revenue generation and optimization efforts provides a more balanced approach that preserves community value and keeps future decisions evidence-based and reversible.

1. Current Program Overview

Program Name: Museum of Dufferin - Dissolution

Department/Division: Development and Tourism

Legislative Mandate (if applicable): No

Program Description:

The Museum of Dufferin exists to collect, preserve, and share the stories of the people, places, and culture of Dufferin County — both past and present. It offers exhibitions, programs, archives, and experiences that help visitors connect with local heritage and culture.

Our target audience includes residents of Dufferin County interested in their regional history and culture; Students and educators through curriculum-linked and interactive learning programs; Visitors and tourists from outside the area seeking cultural and historical experiences; and community partners and families engaged through community events, outreach, and inclusive exhibits.

Goals and Objectives:

The Museum’s Goals and Objectives relate to the following broad areas:

- Heritage preservation: Safeguard tangible and intangible heritage of the region for current and future generations.
- Education & engagement: Provide educational programming (including school programs) and inclusive, meaningful museum experiences for children and adults.
- Community connection: Foster community involvement through events, workshops, and collaborations, while making the museum a welcoming cultural hub.
- Diversity & inclusion: Reflect the evolving stories of Dufferin’s diverse communities and promote accessibility.

These goals relate to the Museum's five-year Strategic Plan, the County of Dufferin's Strategic Plan, and the Dufferin County's Equity Strategic Plan.

Strengths:

- Programming – increase in public programming has increased our revenues and attendance significantly.
- School Programs – additional school programs and the ability to deliver our programs to the Simcoe County School District has significantly increased the number of school children we see each year.
- Group Tours – We have worked hard to increase our number of group tour bookings and to bring large groups of tourists to the museum and Dufferin County more broadly.
- Collections Care – We have made significant strides in reducing the crowding of our storage rooms, removing items that should no longer be in the collection, and overall improving the quality of care we are able to give to the collection.
- Exhibitions – As resources were reallocated from several areas into exhibitions and programs in 2023, exhibitions have begun to look more professional, include more interactive components and are generally more engaging for visitors.
- Revenues – We have drastically increased our revenues over the last three years and have recently implemented several new revenue streams that we anticipate will bring in new income starting in 2026.
- Community Connection – We have a longstanding 32-year connection to the community, meaning we have ties to almost every local organization, school, and community group in Dufferin County.

Weaknesses:

- Lack of Public Transportation – we know this can be a barrier to some people being able to access us at the museum.
- Location Perception – we know there is a very long-standing perception that we are not in a city/town center and therefore our location is more of a hinderance than a positive, but we actually feel that while the location can pose some barriers, it is actually quite positive for us as we have lots of greenspace that we use for our programs and events. Since becoming more of a destination over last three years, we are finding our location to be less of a problem for people. Many recent visitors have commented on the desirability of the location, and besides the issue of inclement weather in the winter months, we do not feel our location is an issue for most people.

Current Delivery Method:

We currently deliver our programs and services predominantly in-house; the only exception is the fabrication of exhibition materials that are beyond our scope of expertise (ex. Making

museum exhibit cases) or contracting local artists to deliver workshops in areas that they specialize in (ex. Cyanotype printing).

2. Potential Changes

Reducing or eliminating services/programs

The dissolution of a museum is a very complicated, difficult, and irreversible process that should not be considered lightly. It should also be understood to be a long-term solution and not a short-term fix as it would take several years to dismantle.

Firstly, the selling of museum artefacts to reduce financial liabilities is considered highly unethical by the International Council of Museums. The process of deaccessioning the museum's permanent collection of over 48,000 objects, finding homes for these objects within the public realm at other institutions, before then moving to auction, would take a team of two people well over 8-10 years to complete in an ethical manner.

As owners of Indigenous artefacts, we would need to consult with the Mississauga's of the Credit First Nation as Treaty holders in our area, as well as local Indigenous groups such as Brave Canoe. Large artefacts, and particularly the heritage buildings located within the museum, would likely not find a home in a public institution because of their size and may be destroyed if an alternative space is not located for them.

The dispersal of the collection would be irreversible and would erase a carefully developed and collected narrative of how Dufferin County came to be and what life has been like here over the centuries. This narrative would not only be lost but the addition to it by future generations would also be sacrificed. As the collection was given in trust to the museum by the local community, the dissolution of the museum would likely be highly contested and would likely result in negative publicity at local, regional, and national levels. Similar actions in different counties and provinces across Canada have resulted in protests and other forms of community push-back.

Sale of the land occupied by the Museum of Dufferin would also raise possible issues. The land was originally donated to the county for \$1 by the Ministry of Transportation for the expressed purpose of opening a museum. Sale of the land for profit might raise issues with the Ministry whose donation was not meant for that purpose.

Providing services using an alternate delivery method

The size of the collection and the requirements for exhibiting artefacts and running programs means that there is no other ready-made space in Dufferin County where a museum could be moved. It is simply not possible to relocate to a different building without significant financial commitments to modify existing buildings or to create a new purpose-built museum. Based on the Museum Manager's experience with being a previous manager at a museum that was built

recently (2019-2021), a new building for a museum of our size would likely cost \$10-\$15 million.

Implementing productivity enhancements through process redesign and/or technology

N/A

3. Key Performance Indicators (KPIs)

Current KPIs:

- The Museum saw attendance from 7,074 visitors in 2025. This is a 15.7% increase in attendance between 2024 and 2025; 96.3% increase between 2019 and 2025.
- The Museum organized 81 programs and 17 events attracting 3,858 participants.
- The museum delivered 17 group tours in 2025 for 312 visitors; this is an increase of 62.5% from 192 tour visitors in 2024.
- Museum revenues have seen significant increases in the last three years, with areas such as programs, giftshop sales, and consignment sales seeing over 59% increases from 2022 to 2025.
- School Program attendance increased by 69% between 2024 and 2025 and earned \$6,433 in revenue.
- The Museum secured \$176,023 in total grant funding in 2025.
- Public monetary donations to the museum in 2025 totaled \$37,791.

Impact on KPIs:

Dissolution – would eliminate all positive improvements and increases we’ve seen over the last three years and negatively impact all communities across Dufferin County.

Data Collection Methods:

- We collect data using the reporting of our Shopify portal which records all our monetary transactions, bookings, outreach, and in-person attendance.
- We use surveys to collect information about visitors, their satisfaction with our programs and events, and information on areas to improve

4. Budget and Financial Analysis

Personnel Costs:

- Staffing costs for all staff \$991,500, includes 7.8 FTEs and 3 student positions

Operating Expenses:

- \$653,400 (not including personnel expenses)

Contract Services:

- Cleaning, snow removal, grounds maintenance, waste collection and elevator maintenance, \$37,250

Capital Expenditures: Capital costs associated with this program

- The 2026 capital contribution for the Museum is \$95,000. This amount is projected to increase by 5% each year which will still result in the capital asset fund being in a negative position for several years beginning in 2027. The 20-year capital work plan is estimated at \$5,051,500 which includes \$2,050,000 for replacement of display cases and collections object storage shelves, there are insufficient funds to replace these items and significant fundraising will be required to support their replacement.
- Total net costs equate to \$1,515,765, including all operating and capital.
- Included in the Museum budget is over \$170,000 in overhead allocation from facilities for time spent on this division, these costs may not be completely saved as staff time may be reallocated elsewhere, as such they are not included in the total savings.

Projected Savings:

Closing the museum would result in approximately \$1,342,575 in annual budget savings through the elimination of personnel, operating and capital costs. Included in the Museum budget is over \$170,000 in overhead allocation from facilities for time spent on this division, these costs may not be completely saved as facilities staff time may be reallocated elsewhere, as such they are not included in the total savings. However, this figure does not account for the significant short-term and long-term costs associated with dissolution, including the management, cataloguing, deaccessioning, transportation, storage, and disposal of over 43,000 artefacts and large heritage structures. The dissolution process would also require specialized staff and professional services for several years, reducing the actual savings realized in the short term.

Additional financial implications include the loss of annual grant funding, donations, earned revenue from programming, rentals, and retail sales, and the loss of interest revenue from the museum endowment designated specifically for museum operations.

Cost-Benefit Analysis:

While dissolution may provide short-term operating budget reductions, the long-term financial and social costs would likely outweigh these savings. The museum generates value through tourism, education, cultural preservation, and community engagement, while also attracting grant funding and private donations that would otherwise not be available to the County. The museum also supports the local creative economy by showcasing artists, artisans, and businesses, and contributes to regional tourism strategies. Eliminating the museum would remove these benefits, reduce economic activity tied to cultural tourism, and require substantial resources to ethically dismantle the collection and infrastructure. As such,

dissolution would result in the permanent loss of cultural, educational, and economic value for Dufferin County residents and visitors.

Support Costs:

There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employees by People and Equity, Finance, IT and Procurement. As well as capital replacement of laptops, monitors, and cell phones where applicable, approximately \$1,000 per year.

5. Service Delivery Impact

Updated Service:

If dissolution were pursued, all museum services would cease, including exhibitions, educational programming, archives access, community events, outreach initiatives, and research services. The physical museum site would no longer operate as a cultural or heritage institution, and public access to the collection would be eliminated.

Also of note, the Dufferin County Forestry Division staff would need to be relocated to a new building as they currently also have offices at the Museum.

Revised Goals and Objectives:

Under a dissolution scenario, the museum's existing goals of heritage preservation, education, and community engagement would no longer be pursued. Instead, County efforts would shift toward the ethical disposition of the collection, the management of legal and regulatory obligations, and the orderly closure of museum operations.

New Service Delivery Model:

There would be no replacement service delivery model within the County. Heritage services currently provided by the museum would effectively cease unless alternative arrangements were made through partnerships with external institutions outside of Dufferin County, though this is highly unlikely. Any transfer of objects to other museums would be determined through the deaccessioning process and may result in collections being relocated outside the region.

Impact on Service Recipients:

Dissolution - Dissolving the museum would negatively impact school aged children, parents of toddlers who use our toddler program, seniors and people with disabilities that benefit from our outreach initiatives, young workers who gain professional experience with us through summer positions, and families who rely on the museum for our regular programming.

This would also negatively impact those who have booked rentals or weddings with us in 2026 and beyond.

Dissolution would also remove access to our online services, such as our archive and collections database that allow people to research online. This would include removal of our veteran's database which holds information on over 6,000 Dufferin veterans.

Dissolution would also impact donors of objects and those interested in donating in the future as they would lose the opportunity to keep their objects in the public realm for preservation, learning, and remembrance.

Access and Equity Considerations:

The dissolution of the Museum of Dufferin would have significant implications for access and equity within the community. The museum currently provides programs, services, and resources that are inclusive and accessible to a wide range of residents, including seniors, people with disabilities, school-aged children, families with young children, and individuals from diverse cultural and socio-economic backgrounds.

Key considerations include:

- **Seniors and People with Disabilities:** Many programs and outreach initiatives are specifically designed to ensure accessibility for seniors and those with physical, cognitive, or sensory disabilities. Dissolution would remove these critical opportunities for engagement and social participation.
- **Children and Students:** The museum provides curriculum-linked programming, interactive learning experiences, and school tours that reach students across Dufferin County. The elimination of these programs would disproportionately affect children in smaller or rural communities with limited access to cultural and educational resources.
- **Indigenous and Culturally Diverse Communities:** The museum preserves and shares artefacts and stories that reflect the heritage of local Indigenous communities and other diverse populations. Dissolution risks the loss of culturally significant materials and opportunities for culturally relevant programming, reducing representation and inclusion in local heritage initiatives.
- **Economic Access:** Many programs are offered at low or no cost to participants, and the museum provides free online access to archival materials and collections databases. Dissolution would disproportionately affect individuals and families with limited financial resources who rely on these free or affordable cultural opportunities.

Overall, the removal of the museum would exacerbate inequities in access to cultural, educational, and heritage resources, reducing opportunities for lifelong learning, social inclusion, and community engagement across Dufferin County.

Quality Assurance Measures

If dissolution were pursued, quality assurance would focus on ensuring that all actions taken during the closure process adhere to recognized professional museum standards, legal requirements, and ethical guidelines. The process would need to be overseen by qualified museum professionals to ensure the proper documentation, care, and transfer or disposal of the museum's collections and records.

Key measures would include maintaining complete and accurate inventory records for all artefacts and archival materials, ensuring photographic documentation and catalogue records are updated prior to any transfer or disposal, and following the County of Dufferin Collections Management Policy (MOD-09) and established deaccessioning procedures. Any transfers of artefacts to other public institutions would be prioritized in order to keep items within the public trust and, where possible, within their geographic and cultural context.

Additional quality assurance measures would include maintaining appropriate environmental conditions for the collection until objects are transferred or disposed of, ensuring proper conservation handling and packing during transportation, and securing professional appraisals when required for objects of significant cultural or monetary value.

The County would also need to ensure compliance with all applicable provincial and federal regulations, including cultural property laws, records retention requirements, and privacy legislation. Documentation related to the collection, donor agreements, loans, and archival records need to be retained and managed according to the County's Records Retention By-law.

Transparency and public accountability would be essential components of quality assurance. Regular reporting to Council and clear communication with stakeholders would help ensure that the dissolution process is conducted responsibly, ethically, and in a manner that maintains public trust.

6. Impact Analysis

Alignment with Strategic Goals

The dissolution of the Museum of Dufferin would not align with the County of Dufferin Strategic Plan, which emphasizes community well-being, tourism development, cultural vitality, and inclusive community spaces. It would also conflict with the museum's own strategic goals of heritage preservation, education, and community engagement. Additionally, dissolution would run counter to broader provincial cultural priorities that recognize museums as contributors to economic development, tourism, and lifelong learning.

Positive Impacts

- Potential reduction in annual operating expenditures for the County.

- Removal of long-term capital maintenance responsibilities associated with museum buildings and infrastructure.
- Opportunity for the County to redirect financial resources to other municipal priorities.

Negative Impacts

- Community backlash – Local backlash to a full museum dissolution would likely be very strong, as would wider negative public perception from national and international news (ex. Halton Region’s dissolution received national and international media attention). This would also likely include backlash from our frequent users, members, and volunteers.
- Rental Cancellations – Weddings and other types of rentals would lose their venue space (often booked months or years in advance), contributing to the negative community backlash from closing the museum.
- Staff/volunteer elimination – Dissolution would mean 8 permanent staff would lose their jobs and the 4 summer workers we employ annually wouldn’t have job opportunities. We would also not be able to mentor the 3-4 student co-op students we see each year who need placement work to complete their schooling. The roughly 30 volunteers we support each year would also lose opportunities to gain experience with us or give back to their community through the museum volunteer program.
- Community Support Lost – The removal of the museum would eliminate ~7,000 visitors we see annually, including school children and those from disadvantaged backgrounds or extra social needs. We also contribute annually to a myriad of local events, fundraisers, and other community activities be it through donating memberships to auctions or promoting local events through our website or in person.
- Tourism Impact – The museum is part of a larger tourism network and the removal of this from Dufferin County would negatively impact the tourism sector in our communities.
- Local Business & Artist Community – The museum supports many local artists, businesses, and craftspeople through its exhibitions, gift shop, and Holiday Treasures craft market and dissolution would hit this group negatively if we were not here to provide these services.

7. Risk Assessment

Identified Risks

Reputational risks for removal of the museum from the Dufferin County portfolio would be the most significant. If the dissolution was handled poorly (unethically or without clear transparency), this would further negatively impact the County’s reputation in the eyes of the public likely for years to come. It would undoubtedly result in loss of public trust in the county.

Mitigation Strategies

Dissolution - The following steps would be necessary to reduce risk:

- Garner public feedback prior to committing to dissolution to ensure proper transparency and to ensure that council understands the full implications of removing this service.

- Comply with proper deaccession policies and procedures, including trying to find alternative public entities to transfer the accessioned collection to and using auction only as a last resort.
- Create a dissolution committee and include museum staff on this committee to provide proper museum protocol and practice to inform decision making.
- Retain a minimal number of museum staff to ensure that the collection is disposed of properly and by qualified professionals.

8. Compliance and Regulatory Review

Regulatory Requirements

The museum complies with the following regulatory requirements:

- Ontario Standards for Community Museums in Ontario (Provincial)
- Ontario Heritage Act (Provincial)
- Federal Cultural Property Law (National)
- International Council of Museum Code of Ethics (International)
- Firearms Act (Federal)

Compliance Status

- The Museum is currently not in compliance with the Firearms Act for owning a business license – the application is being completed for 2026 as we need one more staff to complete training to be qualified to apply
- The Museum is currently not in compliance with the Ontario Standards for Community Museums in Ontario as it requires a committee dedicated solely to its operation to be formed as a part of council and this is planned for June of 2026.

Legal Implications: Yes

Legal implications in the case of dissolution:

- Endowment Fund – If the museum ceased to exist, the endowment fund would no longer give payments to the county for the museum and the \$750,000 would be used to fund other arts/heritage organizations as per the donation agreement.
- CCPERB - Objects of national, provincial or municipal importance should remain in Canada and in the appropriate geographic locale from which they originated subject to as per the Canadian Cultural Property Export Review Board (CCPERB).
- Donation Conditions - Although objects donated to the Museum collections should not be accepted with conditions attached by the donor, some previously accepted objects may have conditions related to their disposal. A thorough search of collection records should be completed to identify such conditions so they can be honoured by the Museum and/or its successor.
- Loans - All objects on loan to the Museum at the time of the decision to dispose of a collection will be returned to the owner or their designated representative.

- Disposal of Collection - All objects will be disposed of or transferred in accordance with the County of Dufferin Collections Management Policy (MOD-09), Section 8, Deaccessioning.
- Auctioned Collection Items - For objects being sold at public auction, County Policy 3-8-1 Procurement of Goods & Services – Disposal of Surplus – 2007 will be followed.
- Collection Revenues - Any surplus funds resulting from the sale of objects should be restricted to gifts to public institutions and agencies located in the County, solely for the purpose of strengthening and expanding their collections. Should this not be possible, understanding that the County was originally formed from portions of the Counties of Wellington, Grey and Simcoe, surplus funds should be restricted to gifts to public institutions and agencies located within those counties.
- Collections Data - Prior to disposal, the MoD should ensure that collection inventories and individual catalogue records are prepared, including a photographic record of each object. These records should be held by the County according to timelines as stated in the County's Records Retention By-law # 2017-12.
- Archaeological collections - Excavated under Provincial license, which are held by the Museum, should be offered to the Province of Ontario, including all associated records, field notes, photographs, maps, etc.
- Outstanding Grants - The Museum of Dufferin staff and County Finance staff will investigate and ensure that all files related to grants previously received in support of the Museum have been finalized and closed. Regarding incomplete or outstanding grants, the Museum shall endeavour to return or repay any outstanding grant monies as the budget allows, prior to disposal of the Museum's assets.
- Personal Information Banks - The disposition of personal information banks such as patron, donor and volunteer registers is subject to limitations on access, use and disclosure under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA).

9. Stakeholder Feedback

External/Community Input

At present, no formal public consultation has been conducted regarding the potential dissolution of the Museum of Dufferin. However, based on the museum's longstanding role in the community and the breadth of its partnerships, it is anticipated that the proposal would generate significant interest and feedback from residents, community organizations, educators, and tourism partners.

The Museum of Dufferin serves as a cultural hub within the county and maintains ongoing relationships with schools, libraries, historical organizations, artists, tourism operators, and community groups. Each year the museum engages with thousands of visitors through exhibitions, programs, outreach initiatives, and special events. It also supports local economic activity by promoting local artisans, hosting community markets, and collaborating with tourism partners.

Should dissolution be considered, additional engagement with residents and stakeholders would be essential to ensure transparency and to understand the broader social, cultural, and economic implications of removing the service. Public feedback could be gathered through community meetings, online surveys, and targeted discussions with key partners such as local businesses, arts and culture organizations, educational institutions, and tourism operators.

Community members who have donated artefacts, volunteered their time, or supported the museum through membership and donations may also wish to provide input, as the museum's collection has largely been built through the trust and contributions of the local community over several decades.

Given the museum's 30+ year history and its role in preserving the stories and heritage of Dufferin County, it is reasonable to expect that the topic of dissolution would be of significant public interest and would require a careful and transparent consultation process before any decisions are made.

International & National Input

As the International Council for Museums succinctly puts it in their principles for Museum Code of Ethics:

1. Museums preserve, interpret and promote the natural and cultural inheritance of humanity. Museums are responsible for the tangible and intangible natural and cultural heritage. Governing bodies and those concerned with the strategic direction and oversight of museums have a primary responsibility to protect and promote this heritage as well as the human, physical, and financial resources made available for that purpose.
2. Museums that maintain collections hold them in trust for the benefit of society and its development. Museums have the duty to acquire, preserve and promote their collections as a contribution to safeguarding the natural, cultural, and scientific heritage. *Their collections are a significant public inheritance, have a special position in law and are protected by international legislation.* Inherent in this public trust is the notion of stewardship that includes rightful ownership, provenance, permanence, documentation, accessibility and responsible disposal.

Nationally, museums are seen by Canadians as highly valuable credible sources of information (80%).¹ The dissolution of the museum would remove this source of credible information during a time when doubt and skepticism are felt throughout society about what is truth and/or fact.

¹ Telling the Truth: Trustworthiness, Learning, and Sharing Authority (2021) National survey, Museums for Me, undertaken as part of "Reconsidering Museums".

Provincial Input

- Provincially, the Ontario Museum Association (OMA) has shown that museums like the Museum of Dufferin are important contributors to economic development, tourism growth, local education, community identity, and senior vitality.²
- Municipalities like Dufferin County create value in their communities through the work of their museums – the OMA has shown that 88% of Ontarians agree that arts and culture add value to their community.³
- Arts, culture and heritage improve the ability of municipal governments to influence local economic development by attracting and retaining a skilled and talented workforce.⁴

Local Input

- If dissolution was seriously considered, it would be prudent for Council to direct staff to set up public feedback sessions in all communities across Dufferin County to hear concerns and input from residents.
- Targeted feedback sessions with major stakeholders should include businesses and community groups with whom the museum has MOU's or partnerships with, including, but not limited to:
- CanHist, Rosemont General Store, Mansfield Outdoor Centre, Adamo Winery, Hockley Valley Resort, Dufferin Quilters Guild, Maggiolly Art, Dragonfly Arts, all Dufferin Public Library branches, all local elementary schools, Brave Canoe, Dufferin County Multicultural Foundation, Dufferin Film Festival, Booklore, Orangeville Legion, Shelburne Legion, Orangeville Rotary Club, Shelburne Rotary Club, Dufferin Oaks, Dufferin Community Foundation, and the Dufferin County Canadian Black Association.
- Feedback sessions should also be provided for current Museum members, volunteers, and donors, many of whom have supported the museum since its inception.
- It would also be prudent to consult with other municipalities or government entities that have proceeded with the dissolution process and hear what lessons learned they may have to impart.
- The County should consult with the Mississaugas of the Credit First Nation as treaty holders in our area as a part of the "duty to consult" as established by the Constitution Act, 1982, and affirmed by various Supreme Court rulings.

Internal Feedback

- All museum staff should be allowed to provide feedback in the event of dissolution.

10. Change Management

Change Management Strategy

² Museums and Rural Communities (2021) Ontario Museum Association Bulletin

³ Museums and Your Municipality (2021) Ontario Museum Association Bulletin.

⁴ Museums and Your Municipality (2021) Ontario Museum Association Bulletin.

If dissolution were pursued, a structured and transparent change management process would be required. This process would include clear communication with the public, staff, and stakeholders about the rationale, timelines, and implications of the decision.

The County would need to establish a formal governance structure, such as a dissolution committee, to oversee the process and ensure that ethical museum practices and regulatory obligations are followed. Maintaining transparency throughout the process would be essential to preserving public trust and minimizing reputational risk.

External stakeholders

External stakeholders would need to be engaged early and throughout the process to ensure transparency and accountability. Engagement methods could include public meetings, online consultations, stakeholder roundtables, and formal consultations with Indigenous communities. Communication materials should clearly outline the reasons for considering dissolution, the potential impacts, and the irreversible nature of the decision.

Should dissolution or major service elimination ever be considered, Council would need to direct formal public consultation, including community meetings across Dufferin County, targeted stakeholder sessions, and Indigenous consultation in fulfillment of the duty to consult.

Engagement would emphasize transparency, ethical obligations, and the irreversible nature of collection dispersal.

Internal engagement would include consultations with museum staff, County leadership, and other departments affected by the closure. Staff would require clear information about timelines, employment impacts, and their potential role in the dissolution process.

Transition Plan

A multi-year transition plan would be required to responsibly wind down museum operations.

Key steps would include:

- Establishing a Dissolution Oversight Committee
- Completing a full inventory and documentation review of the collection
- Identifying and contacting institutions that may accept collection transfers
- Consulting with Indigenous communities regarding culturally sensitive materials
- Managing the return of loaned items and addressing donor conditions
- Cancelling or relocating scheduled programs, events, and rentals
- Developing a staff transition and workforce support plan
- Ensuring all legal, financial, and regulatory obligations are fulfilled

Given the size of the collection and the complexity of the process, the transition period could reasonably take 8–10 years or longer to complete in accordance with professional museum standards. If not all the proper processes/procedures were followed, or more staff were retained to complete the deaccessioning process, the fastest amount of time this could reasonably take would be 5-6 years based on the size of the collection.

Resources Consulted/Further Reading

These one-pagers have been provided for your consideration as they provide important statistics and information about museums in rural communities specifically in the Ontario and Canadian context:

- I. Museums and Rural Communities (2021) Ontario Museum Association Bulletin
- II. Museums and Your Municipality (2021) Ontario Museum Association Bulletin.
- III. Telling the Truth: Trustworthiness, Learning, and Sharing Authority (2021) National survey, Museums for Me, undertaken as part of "Reconsidering Museums".

Municipal Program Assessment: Programming & Outreach Coordinator Positions

Department/Division: Museum of Dufferin

Executive Summary

This assessment reviews the Museum of Dufferin's Programming & Outreach Coordinator positions and their role in delivering public programs, camps, school programming, tours, and outreach activities that support the Museum's Strategic Plan and County objectives related to tourism and community engagement.

Three options are presented in this review:

- **Option A - Maintain two (2) Programming & Outreach Coordinator positions (status quo)**

Budget savings: None

Summary of impact: Preserves current service levels, capacity to deliver approximately 80+ programs annually plus events, camps, school programming, group tours, and outreach. Maintains alignment with the Museum's Strategic Plan, sustains the recent growth trajectory in attendance and earned revenue, and retains cross-coverage to reduce cancellations due to illness, emergencies, or vacation coverage.

- **Option B - Reduce from two (2) Programming & Outreach Coordinator positions to one (1) Programming & Outreach Coordinator position**

Budget savings: \$99,100 annually (salary and benefits less lost revenue).

Summary of impact: Would require a significant reduction in services (estimated 50–60% reduction in annual programs/workshops, reduced school and tour capacity, and camps reduced from 6 weeks (planned 8) to a maximum of 4 weeks). An estimated \$30,000+ annual loss in direct program revenue (with additional indirect losses across admissions and ancillary sales), and a projected decline in overall attendance (estimated 30–40%), potentially returning to approximately 3,500–4,500 visitors annually. This option reduces resiliency (no cross-coverage), increases burnout/turnover risk, and creates misalignment with the Museum's Strategic Plan growth objectives.

- **Option C: Reduce Programming & Outreach Coordinator position from (2) to (1) and increase use of contracted instructors for select programs (alternate delivery method)**

Budget savings: None expected. Contracted delivery typically increases per-program costs (fees plus preparation time and materials) and would likely require a reduction in programming volume. To maintain the same number of workshops per year that we

currently offer with two (2) Programming & Outreach Coordinators, we would need to spend approx. \$32,000 on contracted instructors.

Summary of impact: May support delivery of some specialty programming; however, it does not replace the planning, coordination, marketing, logistics, and on-site delivery functions performed by Programming & Outreach Coordinator's. It also does not factor in the other forms of programming that we deliver, such as tours, school bookings, and off-site programming. If used as a substitute for staffing, the likely outcome is increased costs, fewer programs, reduced attendance, and reduced earned revenue.

Department Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Programming & Outreach Coordinator Positions (2)

Department/Division: Development and Tourism/Museum of Dufferin

Legislative Mandate (if applicable): No

Program Description:

There are two Program and Outreach Coordinator positions currently at the Museum of Dufferin. One position is responsible for planning and organizing tours, adult programs, school programs, and outreach activities. The other position is responsible for children's programming, camps, and shares in running school programs and outreach activities. Some programs need two staff members to properly accommodate the number of participants, and they often work together to develop programs, prepare materials, and execute program delivery.

These two positions are cross-trained so that in the case of illness or emergency, the other staff member can step in to continue running the program – this ensures we do not have to cancel programs and disappoint registrants if there is a staffing issue. This also assists with staff vacation coverages and personal leave coverages – ensuring that we can continue to offer programs throughout the year.

These positions involve both on-site and off-site programs as well as off-site outreach initiatives to share information about the museum and its programs with the public.

Goals and Objectives:

These roles are both essential to sustaining and growing the museum's recent upward trajectory in visitation, public visibility, and community relevance.

The three main goals and objectives of the Program and Outreach Coordinator positions at the Museum of Dufferin are:

1. Increase in-person attendance at the museum

2. Increase income revenue for the museum
3. Increase community awareness of the museum, its programs, purpose, and services.

These positions were created directly as a response to the Museum's Strategic Plan (2022-2027). The positions directly support the Museum's Strategic Plan by delivering on the following objectives:

- Objective 1: Become a Storyteller – Delivering engaging programs that connect visitors with history and culture.
- Objective 2: Centre the Visitor Experience – Offering a diverse range of accessible, high-quality programming.
- Objective 3: Reach Out into the Community – Growing partnerships and presence through outreach and school initiatives.

The Programming & Outreach Coordinators allow the museum to offer a wider range of programs and activities and ensures that the museum can execute the number of programs and activities required to increase visitor attendance and satisfaction. The second staff role is not just support—it is one of the delivery mechanisms for our strategic plan.

Strengths:

- Programming – an increase in public programming has increased our revenues and attendance significantly (doubled since 2022). So far this year (2026) we have consistently sold out of program tickets for adult, child, and group programs – sometimes months in advance.
- School Programs – additional school programs and the ability to deliver our programs to the Simcoe County School District has significantly increased the number of school children we see each year.
- Group Tours – We have worked hard to increase our number of group tour bookings and to bring large groups of tourists to the museum and Dufferin County more broadly.

Weaknesses:

- Capacity – As programs take time to design, prepare, advertise, and execute, there is a limit to what two people can logistically do in one year. They also balance this work with outreach initiatives, school program bookings, group tours, and other booking requests.

We are close to reaching our threshold of maximum number of programs per year, but there is still room for growth – for example, we plan to extend our camps from 6 weeks to 8 weeks to capitalize on the success of this program.

Current Delivery Method:

Our program and outreach coordinators plan, advertise, and deliver all our programs in-house. The only exception is our MoD Masterclass series, which invites local artists to deliver workshops in areas that they specialize in (ex. Cyanotype printing). The Programming &

Outreach Coordinators do also work during these Masterclasses as they are required to organize contracts, materials, and other logistical elements with artists.

2. Potential Changes

Reducing or eliminating services/programs

Reducing two Programming & Outreach Coordinator staff positions to one This would directly correlate to the number or programs, events, tours, and school programs we can deliver each year. We currently deliver ~80 workshops and 17 events per year, welcome over 550 school students, and over 300 group tour visitors.

Each of these would need to be reduced by at least half – which would result in reduced revenues, reduced attendance, and reduced awareness. In 2025, we made \$33,954 from programs that were run by our Programming & Outreach Coordinators.

As we have established a rhythm in programming and outreach, we have identified that we need at least two staff to continue to offer programs, events, and workshops at the current level. Museum attendance and outreach is at an all-time high, and we hope to increase this as the public becomes even more aware of our offerings.

Program and Attendance Stats

Year	Attendance	Programs	Camps	School Students
2019	3,604	3	0	37
2022	3,857	3 + 6 events	0	22
2023*	5,883	30 + 15 events	1 wk	112
2024**	6,981	87 +11 events	4 wks	359
2025**	7,074	81 +17 events	6 wks	582

- For example, in 2022 we ran 3 programs, no camps, and 6 events.
- ***One** programming and outreach coordinator – In 2023 we hired one Programming & Outreach Coordinator and ran *30 programs, 15 events, and 1 week of camp*.
- ****Two** Programming & Outreach Coordinators – 2024 we hired a second Programming & Outreach Coordinator and we ran *86 programs, 11 events, and 4 weeks of camp*.
- In 2025, we had two Programming & Outreach Coordinators, and ran *81 programs, 17 events, 6 weeks of camp* and surpassed our school program bookings and group tour bookings.

In conclusion, this level of delivery is not possible with one coordinator alone. Demand, revenue, and attendance growth are directly correlated to increased staffing levels.

Providing services using an alternate delivery method

- Contracted Instructors - Some programs could potentially be run by contracted instructors; however, these cost significantly more as they usually charge a high fee for either hourly or per-course in addition to program materials and prep time. A reduction in programming would be the ultimate result of this change as we cannot accommodate much of this style of programming with our Programming Operating Budget. This would still result in a decrease in attendance.

Introducing additional sources of revenue

These positions are responsible for the museum's main source of regular revenue as well as admission ticket income from people visiting because of outreach initiatives. They are also indirectly responsible for things like membership sales and gift shop sales, as more visitors who come in person, and more often, means an increase to our other revenue streams.

3. Key Performance Indicators (KPIs)

Current KPIs:

- The Museum saw attendance from 7,074 visitors in 2025. This is a 15.7% increase in attendance between 2024 and 2025; 96.3% increase between 2019 and 2025.
- The Museum organized 81 programs and 17 events attracting 3,858 participants.
- The museum delivered 17 group tours in 2025 for 312 visitors; this is an increase of 62.5% from 192 tour visitors in 2024.
- Museum revenues have seen significant increases in the last three years, with areas such as programs, giftshop sales, and consignment sales seeing over 59% increases from 2022 to 2025.
- School Program attendance increased by 69% between 2024 and 2025 and earned \$6,433 in revenue.
- The Museum Programming & Outreach Coordinators earned \$33,954.32 through programming, tour, and workshop sales, which is significantly higher than the budgeted revenue amount of \$16,000.

Impact on KPIs:

Staff Reduction – A reduction in programming staff would eliminate all positive improvements (increased attendance, increased revenues, etc.) we've seen over the last three years – it would likely bring us back to ~3,500 visitors per year and reduce our revenues by half.

- **Without** two Programming & Outreach Coordinators, the museum will be forced to scale back programs and outreach, which directly contradicts our 2026 goals and would result in a measurable decline in attendance, engagement, and revenue.
A reduction in staff would also impact our plans for growth – we would be unable to support additional group tour bookings, school program bookings, private group

workshops (which we have just released this year), and reduce our camp weeks back to 4 (currently at 6 weeks with plans to go to 8) - this is because of child/staff ratios and the fact that summer camp staff need their lunch break and in case of camp staff illness.

- **With** both Programming & Outreach Coordinator positions, we can continue to scale offerings, diversify audiences, and enhance public value.

These positions are a key factor in driving attendance and attention to the museum and its programs. The program and outreach coordinators *are both absolutely critical* in delivering programs at the museum that ensure the museum not only has increased attendance but that visitors return to the museum repeatedly.

The museum had a very low attendance rate in 2022 of only 3,857 visitors in person, and even lower pre-COVID at 3,604 in 2019.

The aim in 2023 was to increase this by 20% and the museum surpassed this goal, increasing attendance by 52%. In 2024, we had an attendance of 2,051 from Q1-Q2 alone – in 2025 we increased this with 2,126 for Q1-Q2 attendance (despite weather disruptions to some of our major events like Family Day).

Current 2026 stats show that we are set to meet or exceed last year's numbers if both Programming & Outreach Coordinators are in place.

So far between Jan 1 – April 2, 2026:

- 1,134 visitors
- \$16,372 in revenue from programs and workshops
- 824 Outreach connections

Data Collection Methods:

- We collect data using the reporting of our Shopify portal which records all our monetary transactions, bookings, and attendance.
- We use surveys to collect information about visitors, their satisfaction with our programs and events, and information on areas to improve
- We also ask all our program participants to complete a "how did you hear about this program" when signing up for a program or event as a part of the booking form.

4. Budget and Financial Analysis

Personnel Costs:

- Two Program and Outreach Coordinator- \$214,200

Operating Expenses:

- Program budget (workshop supplies, artist fees, etc.) - \$17,000

Contract Services:

None

Capital Expenditures:

None

Projected Savings:

- Total projected savings from removing 1 Programming & Outreach Coordinator position: \$107,100, less loss revenue of \$8,000

Cost-Benefit Analysis:

While the projected gross savings from eliminating one Programming & Outreach Coordinator position is \$107,100 annually, this reduction must be weighed against measurable and projected revenue losses, attendance decline, and broader community impact.

In 2025 alone, Programming & Outreach Coordinator-delivered programming generated \$33,954.32 in direct revenue, in addition to indirect revenue from increased general admission, gift shop sales, consignment sales, and repeat visitation.

A conservative estimate projects \$18,000 annual loss in direct program revenue if staffing is reduced. There would also be a decline in other sources of revenue from program participants, such as gift shop sales (~\$3,430 annually) or consignment sales (~\$10,000 annually). There would also be additional downstream impacts to tourism spending and community engagement.

Historical data demonstrates a direct correlation between increased staffing and attendance growth (from 3,857 visitors in 2022 to 7,074 in 2025). Reducing one POC would likely reverse these gains, potentially returning attendance levels to approximately 3,500–4,000 visitors annually.

Reduced programming capacity would limit future revenue expansion opportunities, stall strategic growth initiatives, and risk reputational damage within the community. When considering both direct financial impacts and indirect economic, strategic, and social returns, the net savings may be substantially offset by lost revenue, diminished service levels, and long-term decline in institutional growth.

Support Costs:

There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employees by People and Equity, Finance, IT and

Procurement. As well as capital replacement of laptops, monitors, and cell phones where applicable, approximately \$1,000 per year.

5. Service Delivery Impact

Updated Service:

- Reducing to one Programming & Outreach Coordinator – With only one Program and Outreach Coordinator, we would need to update our services to reflect this change, reducing the number of programs, workshops, tours, and school bookings we accept each year. This would likely result in about 60% reduction.

Revised Goals and Objectives:

If reduced to one Program and Outreach Coordinator position, goals and objectives would need to be scaled back to reflect operational capacity rather than growth. Revised objectives would include:

1. Maintain core programming at a sustainable level (approximately 30–35 programs annually).
2. Prioritize revenue-generating programs over new initiatives.
3. Maintain school programming at a reduced capacity (maximum 300–350 students annually).
4. Stabilize attendance at approximately 3,500–4,500 visitors annually.
5. Pause new program development initiatives (e.g., expanded accessibility review, new grade-level curriculum development, expanded camp weeks).

These revised goals would shift the museum from a growth model to a core-service model.

New Service Delivery Model:

With one Program and Outreach Coordinator position, service delivery would move from a growth-and-expansion model to a core-service model.

Key changes would include:

- Reduced annual program calendar (focused on high-demand offerings only).
- Elimination of select specialized initiatives (MoD After Dark, MoD Ability Initiative expansion).
- Limited outreach participation at community events.
- Cap on group tour and school bookings based strictly on staff capacity.
- Reduced camp duration (maximum 4 weeks).
- Increased reliance on occasional contracted instructors for specialty workshops (subject to budget).

Program development would prioritize repeatable, low-prep programming rather than innovative or new initiatives. For our repeat visitors, this may be a deterrent as they enjoy new programming, and this ensures we get them to return frequently.

Impact on Service Recipients:

- Fewer program options and reduced scheduling flexibility.
- Increased likelihood of program waitlists and reduced accessibility for working families.
- Reduced outreach presence in rural and underserved areas of Dufferin County.
- Fewer inclusive and adaptive programming options for seniors and people with disabilities.
- Reduced experiential learning opportunities for local schools.

Over time, this would lead to decreased repeat visitation and reduced perception of the museum as a vibrant community hub.

Access and Equity Considerations:

A Program and Outreach Coordinator position removal would disproportionately affect seniors, people with disabilities, and school-aged children as these positions are directly involved in engaging with these areas of the community. Our programs are designed to at minimum cover our costs (non-profit model) so that they are financially accessible to most in our community.

Reduced programming would disproportionately impact:

- Rural residents who rely on outreach programming.
- Seniors who participate in weekday adult workshops.
- Individuals with disabilities that benefit from structured, supported programming.
- Schools with limited transportation budgets that rely on outreach program visits.

Quality Assurance Measures

If staffing is reduced, quality assurance would include:

- Limiting program volume to maintain preparation standards.
- Standardizing program templates and materials.
- Prioritizing programs with consistently strong evaluation scores.
- Conducting quarterly program reviews based on attendance, revenue, and satisfaction surveys.
- Monitoring staff workload indicators to prevent burnout.

However, maintaining current quality levels with significantly reduced capacity would remain challenging.

6. Impact Analysis

Alignment with Strategic Goals

Maintaining two Program and Outreach Coordinator positions strongly aligns with:

- The Museum's Strategic Plan objectives.
- County of Dufferin goals related to tourism growth and community engagement.
- Rural economic development through cultural tourism.

- Accessibility and inclusive community participation.

Reducing one Program and Outreach Coordinator position would create direct misalignment with the Museum’s adopted Strategic Plan and stall progress toward sustained tourism growth.

Positive Impacts

- **Cost savings** – \$94,222.13 would be saved from removing one Program and Outreach Coordinator Position

Negative Impacts

Negative Impacts of Removing 1 Programming & Outreach Coordinator

Operational Impacts

- Reduction of approximately 50–60% of annual programs and workshops.
- Decrease in number of school program bookings.
- Reduction in group tour capacity.
- Camp weeks reduced from 6 (planned 8) to 4.
- Elimination or pause of new program development initiatives.
- Limited ability to respond to private booking requests.
- Fewer outreach events and community appearances.
- Increased program waitlists and reduced booking flexibility.
- Cancellation of specialized initiatives (e.g., accessibility-focused programming).
- Inability to expand into new markets (e.g., additional school boards).

Financial Impacts

- Estimated \$18,000+ annual loss in program revenue.
- Loss of ~\$13,500 in indirect revenue (gift shop and consignment sales).
- Decreased tourism-related economic impact in Dufferin County.
- Reduced eligibility or competitiveness for programming-based grants.
- Lost opportunity for revenue growth through expanded camps and workshops.
- Lower repeat visitation rates impacting long-term revenue stability.

Attendance & Engagement Impacts

- Estimated 30–40% decline in overall attendance.
- Decline in repeat visitors due to fewer offerings.
- Reduced public visibility of the museum in the community.
- Decreased engagement with seniors, families, and schools.
- Fewer opportunities to attract first-time visitors.

Strategic Impacts

- Direct misalignment with the Museum’s Strategic Plan objectives.
- Shift from growth model to maintenance model.
- Inability to achieve 2026 attendance and revenue goals.

- Loss of momentum built over the last three years.
- Reduced innovation and program experimentation.
- Stalled expansion of accessibility initiatives.

Community & Reputational Impacts

- Community disappointment and potential backlash.
- Damage to the museum’s reputation as a vibrant cultural hub.
- Reduced trust from schools and tour operators due to limited capacity.
- Risk of losing established partnerships.
- Perception of decline in County investment in culture and tourism.

Staff & Organizational Impacts

- Increased workload and burnout risk for remaining Program and Outreach Coordinator.
- Decreased program quality due to time constraints.
- Higher risk of staff turnover.
- Loss of institutional knowledge if position is eliminated.
- No ability to cross-cover during illness or emergencies – cancellations of programs.
- Lower staff morale.

Equity & Accessibility Impacts

- Reduced inclusive programming for people with disabilities.
- Fewer weekday programs for seniors.
- Reduced outreach to rural communities.
- Limited ability to accommodate diverse learning needs in school programs.
- Reduced affordability if fewer low-cost programs are offered.

Long-Term Risks

- Regression to pre-growth attendance levels (~3,500 visitors).
- Difficulty rebuilding program reputation if restored later.
- Loss of competitive positioning relative to other regional museums.
- Reduced ability to leverage programming as a tourism driver.
- Slower recovery in the event of future disruptions.

Collectively, these impacts demonstrate that removing one Program and Outreach Coordinator position would not simply reduce staffing costs, it would significantly alter the museum’s operational capacity, financial stability, community presence, and long-term sustainability.

7. Risk Assessment

Identified Risks

Removing one Program and Outreach Coordinator position – The following are risks associated with removing one of the Program and Outreach Coordinator positions:

- Drop in program delivery by at least 60%
- Decreased attendance (estimated 30–40%)

- Reduced program revenue (estimated \$30,000+ loss annually)
- Reputational damage in the community
- Program quality decline due to overwork
- Staff burnout and potential turnover

Running high volumes of programming with a single Program and Outreach Coordinator poses a serious risk of burnout and diminished program quality. Sustained overwork would affect not only staff well-being but also the consistency of visitor experience and delivery standards.

Mitigation Strategies

- There really are no mitigation strategies to offset the removal of a Program and Outreach Coordinator position besides a significant reduction in programming services provided by the museum.

8. Compliance and Regulatory Review

Regulatory Requirements

- Child-Adult ratios – for the safety of children, we are required to comply with child-adult ratios which vary depending on the age of the children. Some programs would need to be reduced in size if only one staff member is available to supervise them.

Compliance Status: N/A

Legal Implications: No

9. Stakeholder Feedback

Both informal and formal ongoing stakeholder feedback indicates:

- Strong community support for expanded programming over the past three years.
- Increased positive engagement from local schools and educators.
- Growth in repeat adult workshop participation.
- Increased demand from tour operators and seniors' groups.
- Positive feedback through post-program surveys indicating high satisfaction and likelihood of return visits.

Key trends in programming and outreach observed:

- Programs frequently sell out.
- Waitlists are common for camps and specialty workshops.
- Teachers have requested additional curriculum-aligned offerings.
- Community members have expressed appreciation for increased year-round programming.

No stakeholder feedback has indicated that programming levels are excessive or unnecessary. Instead, demand suggests continued appetite for growth.

Should staffing be reduced, it is anticipated that:

- Frequent participants will express dissatisfaction.
- Schools may seek alternative providers.
- Tourism operators may redirect group bookings elsewhere.

10. Change Management

Change Management Strategy

If Council directs a reduction from two Programming & Outreach Coordinator positions to one, the Museum of Dufferin will implement a structured, phased change management approach focused on operational stability, service prioritization, and public transparency.

The strategy will prioritize:

- Protecting core revenue-generating programming.
- Maintaining compliance with safety and child-adult ratio regulations.
- Preserving institutional knowledge.
- Minimizing disruption to the public wherever possible.
- Supporting remaining staff to prevent burnout and service degradation.

The shift would require moving from a growth-oriented service model to a stabilization model. Programming would be strategically prioritized using data collected through Shopify reporting, attendance metrics, and revenue analysis. Programs with consistent sell-out rates, strong financial returns, and high evaluation scores would be retained, while lower-performing or labour-intensive initiatives would need to be removed.

Operational efficiencies would be introduced where possible, including:

- Standardizing workshop templates and materials.
- Reducing program customization.
- Reducing outreach activities.
- Prioritizing repeatable programming formats over new pilot initiatives.
- Implementing tighter booking windows for school and group tours.

Clear communication to Council, staff, schools, tourism partners, and the public would be central to maintaining trust and managing expectations.

Stakeholder Engagement Plan

Engagement will be proportionate to the level of impact and will focus on proactive communication.

Internal Stakeholders

- Remaining museum staff should be consulted early regarding revised service levels and workload adjustments.
- Revised job responsibilities should be clearly documented and communicated.

- Ongoing check-ins will be scheduled to monitor workload and morale.

External Stakeholders

Schools and Educators

- Direct notification regarding reduced booking capacity.
- Clear communication of revised booking timelines and limits.

Group Tour Operators

- Advance notice of reduced availability.
- Structured seasonal booking windows to manage expectations.

Program Participants and General Public

- Website updates outlining revised program frequency.
- Social media updates with new revised programming frequency.
- Clear calendar transparency to reduce uncertainty.

Community Partners

- Direct outreach to explain changes and reaffirm commitment to collaboration within capacity limits.

Should feedback indicate significant dissatisfaction or attendance decline beyond projections, adjustments should be reviewed within six months.

Transition Plan

A phased transition model should be implemented over a 6–12-month period to minimize service disruption for the 2026 program calendar which is created a year in advance.

Phase 1: Planning (Months 1–2)

- Confirm Council direction and implementation timeline.
- Finalize revised service targets (program numbers, camp weeks, school caps).
- Identify programs to retain, reduce, or pause.
- Adjust marketing plans and public materials accordingly.
- Develop updated annual programming calendar reflecting reduced capacity.

Phase 2: Implementation (Months 3–6)

- Gradually reduce program volume rather than implementing immediate cancellations.
- Communicate revised booking limits to schools and tour operators.
- Monitor early indicators including attendance, revenue, and survey feedback.

Phase 3: Stabilization and Monitoring (Months 6–12)

- Conduct KPI review comparing attendance, revenue, and engagement against baseline projections.

- Evaluate workload sustainability for remaining Program and Outreach Coordinator.
- Adjust program mix as needed to maintain financial viability.
- Report findings to Council with updated financial and performance analysis.

A formal service review would be recommended if at any stage the reduction results in:

- Attendance declines exceeding projected 30–40%
- Revenue reductions beyond \$30,000 annually
- Significant reputational damage
- Or staff burnout indicators

Municipal Program Assessment: Hurricane Clip Rebate Program

Department/Division: Building Services

Executive Summary

The Hurricane Clip Rebate Program is a discretionary initiative administered by Building Services to encourage the voluntary installation of hurricane clips in residential construction. While the program has seen participation, it is not legislated, not aligned with a Council approved strategic plan, and its performance is measured by activity rather than demonstrated- outcomes. Program costs are unpredictable and have exceeded the approved annual budget in multiple years, driven by fluctuating construction activity and significant administrative effort.

This report provides an assessment of two program options:

- **Option A - Eliminate the Hurricane Clip Rebate Program**
Remove the discretionary rebate program entirely. The program is not legislated, not tied to a Council approved strategic plan, and is resource- intensive- relative to its benefits. Regulatory building inspection and compliance services would continue unchanged, with staff time redirected to core Building Code Act responsibilities.
Budget Savings: \$11,000–\$22,000 annually; \$55,000–\$110,000 over five years
- **Option B – Maintain the Hurricane Clip Rebate Program (Status Quo)**
Budget Savings: None

Department Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Hurricane Clip Program

Department/Division: Development and Tourism/Building Services

Legislative Mandate (if applicable): No

Program Description:

This rebate program provides customers with \$4.50 for each installed and inspected hurricane clip used to secure the roof rafters or trusses to the top plate of the wall on your new construction project. During the framing inspection, the Building Inspector will record the number of eligible hurricane clips installed. Once the permit is completed, Dufferin County will forward a cheque for the appropriate dollar amount to the property owner (maximum 75% of

the permit fee). This program is eligible for customers that do not require hurricane clips for their truss design, therefore, acts an incentive to install.

The County currently collaborates with the Institute for Catastrophic Loss Reduction (ICLR). ICLR is an independent research institute affiliated with Western University that works to reduce the impact of natural disasters.

Goals and Objectives:

The Hurricane Clip Program was established to:

- Encourage the voluntary installation of hurricane clips in residential construction where they are not required by truss design.
- Reduce the risk of roof uplift and structural damage during high wind events.
- Improve community resilience to severe weather impacts.
- Support applied research and mitigation efforts through collaboration with the Institute for Catastrophic Loss Reduction (ICLR).

While the program contributes to improved building resilience, it is not tied to a legislated requirement, Council approved strategic plan, or formal long term divisional work plan.

Strengths: This program has incentivized customers to install hurricane clips when not required by design, as a result, reducing the risk of structural damage.

Weaknesses: The Building Division allocates \$11,000 annually to administer the program; however, expenditures frequently exceed this amount. In addition to the financial pressures, the program is highly resource intensive, requiring a significant commitment of staff time to manage day to day operations, respond to inquiries, and ensure compliance with program requirements. This ongoing demand places added strain on existing workloads and contributes to operational inefficiencies.

Current Delivery Method: This process is mostly run internally, with some collaboration with the Institute for Catastrophic Loss Reduction when it comes to partial reimbursement of money.

2. Potential Changes

Describe areas under consideration

We could remove the program entirely. This is not a requirement through the provincial or federal government. By eliminating this program, this would allocate more time for staff to focus their time and efforts on regulatory duties. In addition to reducing staff workload, this would save the Building Division thousands of dollars every year.

3. Key Performance Indicators (KPIs)

Current KPIs:

Total number of hurricane clips in 2024: 5,147

Total number of hurricane clips in 2025: TBC

Impact on KPIs:

The program demonstrates uptake of voluntary risk reduction measures; however: The KPI measures activity (number of clips installed), not outcomes (actual reduction in damage or loss).

There is no available data linking program participation to verified reductions in repair costs, insurance claims, or post storm damage.

Program demand fluctuates with building activity, making expenditures difficult to predict year over year.

Data Collection Methods:

Inspection staff currently record this on site during the framing inspection and report this to building administrative staff. Building Admin staff work directly with Finance staff on requisitions and records management.

Baseline Data:

- Program expenditures exceeded the approved budget in multiple years.
- 2024 expenditures totaled \$22,347, more than double the approved \$11,000 allocation.
- Administrative effort required is ongoing and increases proportionally with construction activity.

4. Budget and Financial Analysis**Current Budget Breakdown:**

Currently \$11,000 is budgeted to run this program each year, however, we have gone over budget in some years. In 2024, the total expenditures were \$22,347, 2025 was \$1,170. We provide a total reimbursement of \$4.50/clip to the customer, ICLR contributes \$1.50/clip and Building Services contributes the remaining \$3.50/clip.

Projected Savings: It is projected to save upwards of \$11,000-\$22,000 each year.

Cost-Benefit Analysis:

Eliminating this program results in an immediate annual savings of the full amount, since there are no termination, transition, or administrative costs associated with discontinuation. Over a 5-year period, this equates to \$55,000-\$110,000 in avoided expenditures plus staff time.

Based on 2024 program activity, staff time required to administer the Hurricane Clip Program is significant. Each reimbursement request requires approximately 60 to 90 minutes of combined inspection, administrative, and finance staff time and may include up to 150 hurricane clips.

Using the 2024 total of 5,147 clips, and assuming requests are submitted at the maximum clip threshold, this equates to approximately 34-35 individual requests per year. This results in an estimated 34 to 53 hours of staff time annually devoted solely to program administration. In practice, many requests include fewer than 150 clips, which increases the number of transactions and further elevates staff time demands. This workload grows directly with

construction activity and diverts staff resources away from core regulatory responsibilities such as inspections, compliance enforcement, and permit processing.

Reallocating staff time from this program would allow the division to focus on higher priority core services, improving efficiency and reducing administrative burden. Eliminating such a resource intensive program would also help decrease overtime, ease workload pressures, and address operational inefficiencies. Additionally, the funds currently dedicated to the program could be redirected to initiatives with greater impact, supporting modernization, compliance improvements, and more predictable budgeting.

Support Costs:

While the program has no third party operational costs beyond the partial reimbursement from ICLR, internal support costs include:

- Inspection time during framing inspections.
- Administrative staff time for inquiries, verification, requisitions, cheques, and financial tracking.
- Finance staff time supporting frequent reimbursements.

These support costs are not fully captured in the program budget.

5. Service Delivery Impact

Updated Service:

If eliminated, the County would no longer offer financial rebates for voluntary hurricane clip installation. All regulatory inspection and enforcement services would continue unchanged.

Revised Goals and Objectives:

Upon elimination, Building Services would refocus on:

- Core regulatory duties under the *Building Code Act*.
- Timely inspections and permit processing.
- Enforcement and compliance activities with clear legislative authority.
- Program delivery with predictable and sustainable budgeting.

New Service Delivery Model:

- Regulatory services continue as direct services.
- No incentive or rebate administration required.
- Staff time redirection to inspections, enforcement, and modernization initiatives.

Impact on Service Recipients:

Cutting the program would have minimal impacts on customers. The impact to the recipient of this service is mainly related to the loss of a financial incentive rather than a loss of service. Customers would no longer receive the monetary reimbursement that currently offsets the cost of installing hurricane clips. While the clips themselves are relatively inexpensive, the incentive helps encourage participation and reduces the out of pocket cost for homeowners. Because

the reimbursement can exceed the actual cost of installation, the program may result in participants realizing a net financial gain rather than solely offsetting construction costs. Without the program, customers who still choose to install clips would bear the full cost themselves, and some may be less motivated to undertake the upgrade. This could result in fewer homes receiving this added wind resistance protection, leaving some properties more vulnerable during severe wind events.

From a service delivery perspective, customers would likely see little to no negative impact. In fact, with staff no longer required to administer the program, customers may experience faster response times and improved efficiency in core building services.

Access and Equity Considerations:

This will not adversely impact any groups or exclude any individuals.

Quality Assurance Measures:

Service quality will be maintained by:

- Preserving inspection standards and technical oversight.
- Improving response times and reducing administrative backlogs.
- Ensuring inspectors focus on safety and compliance rather than program administration.

6. Impact Analysis

Alignment with Strategic Goals:

Eliminating the program supports municipal priorities by:

- Improving financial sustainability and budget predictability.
- Reducing administrative burdens on front-line staff.
- Allowing staff to focus on legislated core services.
- Supporting efficient service delivery during periods of constrained resources.

Positive Impacts: This will provide significant cost savings over time and increase service efficiencies in other areas of the division.

- Annual savings of \$11,000–\$22,000, with long term- avoided costs of \$55,000–\$110,000 over five years.
- Reduced staff workload and administrative complexity.
- Improved allocation of staff time to inspections and enforcement.
- Reduced operational inefficiencies and overtime pressures.

Negative Impacts:

Eliminating this program removes a key incentive that encourages homeowners to take measures that reduce the risk of structural damage during natural disasters

7. Risk Assessment

Identified Risks:

Failing to incentivize the installation of hurricane clips presents several significant risks to both individual property owners and the broader community. Without these connectors, roof structures are far more vulnerable to uplift forces generated during severe wind events. When strong winds pass over a peaked roof, they create upward pressure. If the roof is not adequately anchored to the walls, this uplift can result in partial or complete roof failure.

A roof separation often leads to extensive structural damage, exposing the interior to wind and rain, increasing the likelihood of wall collapse, and creating hazardous airborne debris. These failures not only endanger occupants but also place additional strain on emergency services and increase post storm recovery costs. Hurricane clips is an inexpensive and straightforward reinforcement that provide a continuous load path that helps ensure the roof remains secured to the walls during high wind events.

Mitigation Strategies:

It is important to inform customers not only about the risks associated with not installing hurricane clips, but also about the relatively low cost of doing so. Hurricane clips typically range from \$1 to \$3 each. A standard home may require approximately 60 to 90 clips, while larger homes may need up to 160. By clearly communicating that the safety benefits significantly outweigh the modest installation cost, we can encourage greater adoption of hurricane clips.

It is also important to note that the Ministry has indicated its intention to introduce future Building Code amendments that will require the use of hurricane clips; however, the timing of these changes has not yet been confirmed. Encouraging their installation now helps align local practices with anticipated provincial requirements and reduces long term risk.

8. Compliance and Regulatory Review

Regulatory Requirements: None.

Compliance Status: The program operates in compliance with all applicable requirements. No audits or regulatory findings are associated with the program.

Legal Implications: There are no legal implications associated with discontinuing the program, as it is a discretionary incentive program with no statutory obligation.

9. Stakeholder Feedback

External/Community Input:

Formal public consultation has not occurred. As the program is voluntary and administrative in nature, elimination would not affect mandated services. Improved efficiency in core Building Services may positively influence public perception.

Internal Feedback:

There is an exceptional amount of administrative time required to run this program. Inspection staff have invested time counting the hurricane clips on site, administrative staff have invested time creating cheque requisitions and working with the finance division.

10. Change Management

Change Management Strategy:

- Clearly communicate the rationale for program elimination (cost, efficiency, non-mandated).
- Emphasize that safety can still be achieved at low cost without a rebate.
- Reassure stakeholders that core inspection and compliance services are strengthened.

Stakeholder Engagement Plan:

- Internal staff briefings prior to implementation.
- Update program information on the County website and permit materials.
- Provide consistent messaging to builders and applicants during permit intake.

Transition Plan:

- Provide advance notice to permit applicants of program end date.
- Honour reimbursements for eligible permits issued prior to the cutoff.
- Update internal procedures and remove administrative workflows.
- Responsible Parties: Chief Building Official and Building Services Administration.
- Timeline: Program can be wound down within the current fiscal year.

Municipal Program Assessment: Seniors At Risk Coordinator Position

Department/Division: Community Support Services

Executive Summary

The Seniors at Risk Coordinator position was established to provide a centralized point of contact and system navigation support for vulnerable seniors with complex health and social needs, addressing service gaps and improving coordination across providers. While the role aligns with County strategic priorities and has demonstrated historical demand, implementation challenges have left the position vacant since 2023.

Three options were explored through this review:

- **Option A – Proceed with Mid-Year Recruitment in 2026**
Recruit and fill the Seniors at Risk Coordinator position mid-year in 2026, aligning with the recommendations of the Older Adult Services Review.
Budget Impact: Cost (2026) - \$72,900. One-time Budgetary Savings (2026): \$67,200
- **Option B – Defer Implementation to 2027**
Do not proceed in 2026; move the position to the 2027–2028 budget year while exploring potential funding to offset costs.
Budget Impact in 2027: \$134,400 annually
Budget Savings (2026): \$141,400 (one time)
- **Option C – Do Not Move Forward with the Position**
Permanently discontinue the Seniors at Risk Coordinator position and maintain the current service model.
Budget Impact: Avoids all future staffing and operating costs.
Budget Savings: \$141,000

Department Recommendation:

Proceed with Option A because the Seniors at Risk Coordinator role directly addresses identified service gaps for vulnerable seniors by providing a centralized point of contact, system navigation, and coordination across health and social service providers. The report notes that the position aligns with County strategic priorities and the recommendations of the Older Adult Services Review, and that historical data shows consistent demand for this support. Proceeding mid-year allows the County to re-establish dedicated accountability and advocacy for seniors at risk, rather than continuing to rely on already-stretched community partners to absorb these responsibilities.

1. Current Program Overview

Program Name: Seniors at Risk Service Coordinator (SARSC)

Department/Division: Community Services, Community Support Services

Legislative Mandate (if applicable): None

Program Description:

- Provides a single point of contact for seniors and families facing barriers to accessing services due to complex or unique needs, particularly those without primary care or the ability to navigate the health care system independently.

Goals and Objectives:

- Supports vulnerable seniors by helping them engage with and connect to services that enable them to thrive and live well in their communities.
- Provides a single point of contact for seniors and families experiencing challenges accessing healthcare and social services.
- Enhance community well-being and safety through a collaborative approach focused on relationship-building and partnerships with seniors.
- Acts on behalf of seniors to explore and improve access to healthcare services across Dufferin County, reflecting the strategic value of community.

Strengths:

- Supports seniors through interventions when there is a lack of primary care, limited access to basic health services, or when seniors are experiencing or are at risk of abuse.
- Offers support to agencies and organizations across Dufferin County addressing the complex needs of vulnerable seniors.
- Promotes, educates, and informs agencies and the broader Dufferin community about service resolution mechanisms and issues affecting vulnerable seniors.
- Identifies system-level service gaps and advocates for system-level changes by liaising with agencies and ministry contacts.
- Receives referrals from the OPP, hospitals, Community Paramedics, Family Health Teams, and community-focused agencies.

Weaknesses:

Current Delivery Method:

- position was previously approved in 2025 and was to be contracted to Community Paramedics however challenges were encountered through the labour relations process. This position is currently vacant.

2. Potential Changes

Describe areas under consideration:

1. Option A: Look to hire mid-year 2026 for a cost of \$65,900 (wages and benefits) plus office equipment (\$7,000).
2. Option B: Move position into 2027-2028 budget year for a cost of \$134,400 for the budget year and investigate options to seek funding to offset the cost of this position.
3. Option C: Do not move forward with this position.

- Current service delivery would continue through existing health, social, and emergency service providers, including hospitals, OPP, Community Paramedics, Family Health Teams, and community agencies.
- These providers would continue absorbing the coordination and case management responsibilities for vulnerable seniors
- There may be a lack of centralized accountability or system-level advocacy function in place to address recurring gaps or trends affecting seniors at risk.

3. Key Performance Indicators (KPIs)

Current KPIs: Position vacant since 2023. KPI's collected monthly include:

1. Total new referrals received
2. Types of referrals received
3. Total coordinated services provided
4. Trends and health system issues
5. Total case conferences
6. Resolutions/Progress on cases

Impact on KPIs:

Not moving forward with this position could potentially leave vulnerable seniors without a resource to navigate them through complex health concerns or potentially leave the senior at risk of abuse. Currently, other health care providers may be providing some support (primary care physicians, CMHA, Community Paramedics, Acute Care facilities) but coordination of services would be of benefit.

Data Collection Methods:

Reports

Baseline Data:

Historical data shows approximately 100 seniors were referred to the position on an annual basis. Face to face statistics along with non-face to face statistics show that 800-1200 contacts were made yearly. Concentration of support for inadequate housing/squalor living conditions, justice system navigation and support and financial and food insecurity were provided.

4. Budget and Financial Analysis

Current Budget Breakdown:

1. Personnel Costs: \$134,400 salary and benefits (based on 2026 budget year)
2. Operating Expenses: Computer and IT equipment, Cell Phone, Office Furniture, Mileage Costs first year approximately \$7,000. Annual costs beyond year 1 would be approximately \$4,000.
3. Contract Services: None
4. Capital Expenditures: None

Projected Savings:

\$134,400 salary and benefits plus \$7000 in annual expenses related to IT equipment and mileage.

Cost-Benefit Analysis:

Difficult to determine. For consideration that seniors that attend the emergency department or access services such as the OPP due to lack of available resources could see costs to health care and other systems in the range of \$5-\$10 thousand per year, increasing as service utilization increases.

Support Costs: IT, Finance, Communications, P&E

- There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employee by People and Equity, Finance, IT and Procurement.

5. Service Delivery Impact

Updated Service: None

New Service Delivery Model:

Vulnerable seniors would continue to access services through traditional methods (primary care physicians, CMHA, Community Paramedics, Acute Care facilities). There may be opportunities to connect seniors to services through the Health and Human Services Hub.

Impact on Service Recipients:

Vulnerable seniors to navigate health and other systems independently and placed at risk of abuse.

Access and Equity Considerations:

Will provide greater equity to an underserved population and at risk population. Will look to align programs and services to improve service delivery.

Quality Assurance Measures:

Reporting on outcomes of supports provided, in place and reporting on successful outcomes.

6. Impact Analysis

Alignment with Strategic Goals:

- Yes, supporting opportunities to improve access to health care and other community services.

Positive Impacts:

- Community connections for seniors, establishing supports for improved living and educating the community on risks seniors may be enduring.

Negative Impacts:

- More utilization of health care systems.

7. Risk Assessment

Identified Risks: Financial, operational, reputational, or other risks associated with change.

Mitigation Strategies: Unknown.

8. Compliance and Regulatory Review

Regulatory Requirements: N/A

Compliance Status: N/A.

Legal Implications: N/A

9. Stakeholder Feedback

External/Community Input: None currently.

Internal Feedback: None currently.

10. Change Management

Change Management Strategy:

- Community messaging, connecting to community resources in person, by phone and other social media.

Stakeholder Engagement Plan:

- Community messaging, connecting to community resources in person, by phone and other social media.

Transition Plan: N/A.

**Municipal Program Assessment:
Shelburne Employment Resource Centre**

Department/Division: Ontario Works
Legislative Mandate: None

Executive Summary

As part of the Program Review, the Shelburne Employment Resource Centre (SERC) could be considered for elimination due to provincial Employment Services Transformation, which shifted all employment programming to Employment Ontario providers. Eliminating SERC would generate operational cost savings (approximately \$113,900 annually) while maintaining access to employment supports through the HART Hub and allowing Ontario Works to refocus on life stabilization, navigation, and program integrity.

One option is under consideration in this review:

- **Option A – Eliminate the Shelburne Employment Resource Centre (SERC)**
Discontinue the Shelburne ERC due to the provincial Employment Services Transformation (employment services now delivered through Employment Ontario/Serco). Redirect employment-related needs to the HART Hub; Ontario Works refocuses on stabilization, navigation, and program integrity.
Budget Savings: \$113,900

Recommendation:

Proceed with Option A: eliminate/close the Shelburne Employment Resource Centre (SERC) to realize \$113,900 in annual savings while maintaining access via the HART Hub.

1. Current Program Overview

Program Name: Shelburne Employment Resource Centre (SERC)

Department/Division: HHS / Ontario Works

Legislative Mandate: Ontario Works Act, 1997

Program Description:

The Employment Resource Centre is self-directed and open to all community members looking for employment, help with job searching, or resources. Services include access to computers, internet, fax, and photocopiers.

Goals and Objectives:

Goal: Enhance service delivery through improved communication, streamlined processes, and user-friendly resource access.

Objectives:

- Provide tools and technology (computers, digital resources, online guides) to ensure accessibility and ease of use.
- Increase awareness of ERC services through coordinated communication with County departments and community partners.

Strengths:

- The SERC is open to all community members, removing eligibility barriers and allowing broad community access.
- Users are self-directed to services that empower users to seek support at their own pace and comfort level.

Weaknesses:

- Local OW offices no longer have a legislated or operational need to provide on-site employment resources such as employment.
- System Service Managers (SSM) and managed Employment Ontario (EO) providers now cover the full continuum of employment support.
- Current onsite staff support service providers rather than Ontario Works initiatives.

Current Delivery Method:

- Internal via Ontario Works program.

2. Potential Changes

Describe areas under consideration

As part of the Program Review, the Shelburne Employment Resource Centre (SERC) is being considered for elimination due to changes in the employment services landscape. Ontario Works no longer delivers employment services, as all employment programming is now provincially managed through Employment Ontario and delivered by Serco.

As a result, SERC is no longer required to support Ontario Works’ core mandate. Eliminating the Centre would reduce operational costs and allow staff to refocus on life stabilization and program integrity.

Employment services would continue through the HART Hub, which offers an integrated, modern model with employment specialists, wrap-around supports, and technology access, eliminating duplication of infrastructure while maintaining service access.

3. Key Performance Indicators (KPIs)

Current KPIs: Current Usage:

Table below outlines number of visits:

Organization	2025 Average Monthly Usage (Jan–Dec)	2026 Average Monthly Usage (Jan–Mar)
Georgian College	6	6

Contact North	19	10
Upper Grand District Schoolboard	30	47
Small Business	1	0
Poly Cultural	1	0 (no longer using space)

Impact on KPIs: N/A

Data Collection Methods: Staff collection on client walk-ins.

Baseline Data: N/A

4. Budget and Financial Analysis

Current Budget Breakdown:

- Personnel Costs: Salary and benefits \$96,600 (annual)
- Operating Expenses: \$17,390 (annual) (removing this would decrease MLC rent revenue unless space is leased to another provider)
- Capital Expenditures – N/A

Projected Savings: \$113,990

Cost-Benefit Analysis:

- The financial savings and improved system alignment outweigh the service losses, primarily because the province has restructured employment services so that municipalities like Dufferin are no longer responsible for operating employment centres.
- The SERC’s core functions are fully replaced—and in most cases enhanced—by Employment Ontario, Serco, and integrated case management tools under EST.
- Remaining gaps (walk-in access, navigation) can be mitigated through the HART Hub and strengthened referral processes.
- The closure yields clear cost savings and aligns with provincial mandates, while the impacts on clients can be effectively managed through strong transition planning and partnerships.

Support Costs: IT, Finance, Human Resources, P&E

- There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employee by People and Equity, Finance, IT and Procurement.

5. Service Delivery Impact

Updated Service:

- As the province moves towards centralized intake, Employment Services has been contracted out to a third party agency and is no longer supported through Ontario Works.

- Dufferin County Community Support Services Staff who work in an adjacent area will be able to support clients coming in to drop off paperwork. Mail slots have been installed for this purpose as well.

Revised Goals and Objectives: N/A

New Service Delivery Model: N/A

Impact on Service Recipients:

Closing the ERC primarily affects walk-in jobseekers (loss of onsite technology and -self serve materials), OW staff (workload shifts to stabilization and navigation), and Employment Ontario/ Service System Managers providers (increased referrals and clearer accountability). These impacts are consistent with Ontario’s Employment Services Transformation, which centralizes employment and training delivery under Employment Ontario and its Service System Managers (including Serco in designated regions), while OW focuses on -person-centered- stabilization and coordinated referrals. With a planned transition—warm handoffs, shared intake at the HART Hub, and updated referral protocols—service quality and access can be maintained or improved while eliminating duplication. For those utilizing the SERC for non-employment related services may be impacted. These individuals will need to be redirected to other appropriate supports where the intention for those services are meant to be utilized, rather than an employment resource centre.

Access and Equity Considerations:

Currently an external provider is onsite once per week to provide employment services support to clients. This will be impacted by the closing of the SERC and consideration will need to be made on potentially relocating this provider within the Mel Lloyd Center.

Quality Assurance Measures:

Service quality will be preserved by shifting employment functions to Employment Ontario providers and System Service Managers—who are now legally responsible for employment outcomes—while Ontario Works enhances its focus on life stabilization, supported by shared tools such as the Common Assessment and Action Plan. Through clear referral pathways, integrated case management, strong collaboration with the HART Hub, and transparent communication, the transition will maintain (and likely improve) service quality for clients seeking employment supports.

6. Impact Analysis

Alignment with Strategic Goals: Yes. The proposed change aligns with Dufferin County’s 2023–2026 Strategic Plan, which emphasizes efficient service delivery, collaboration, and aligning programs with changing community needs. Closing the ERC eliminates duplication and supports a streamlined, integrated service model consistent with the County’s mission. It also reflects the provincial Employment Services Transformation, which moves all employment services to Employment Ontario and SSMs (e.g., Serco), not municipalities.

Positive Impacts:

- Cost savings from reduced facility, staffing, and technology maintenance related to SERC operations.
- Increased efficiency as employment services shift to specialized Employment Ontario providers, whose mandate includes integrated and outcomes-oriented employment services.
- Better service alignment with provincial expectations that OW focus on stabilization while EO/SSMs handle employment programming.

Negative Impacts:

- Potential confusion or frustration during the transition if clients are unsure where to access employment support.
- Concerns from community members who may perceive the closure as a reduction in local service levels despite the province's restructuring.

7. Risk Assessment**Identified Risks:** N/A**Mitigation Strategies:** N/A**8. Compliance and Regulatory Review****Regulatory Requirements:** N/A**Compliance Status:** N/A**Legal Implications:** ESA for notice and change of staffing location and restructuring.**9. Stakeholder Feedback****External/Community Input:**

Due to the self-directed nature of the Employment Resource Centre and the absence of formal feedback mechanisms, external stakeholder or community input is limited and difficult to assess. The program's setup does not naturally generate structured feedback from residents or community groups, making it challenging to determine the broader community impact.

Internal Feedback:

Collectively, internal feedback supports the assessment that the ERC is underutilized and no longer functions as an employment resource in practice. Staff report very low foot traffic, noting that most visits are for nonemployment related reasons such as dropping off documents or seeking assistance outside the ERC's intended purpose.

10. Change Management**Change Management Strategy:**

- The reduction and eventual closure of the ERC will be communicated through formal written notice to affected staff, followed by individual meetings to discuss impacts and next steps.
- Staff will be advised of the organizational shift in employment service responsibilities and the resulting need to realign internal resources.
- As part of the change strategy, staff currently assigned to the Shelburne ERC will be offered the opportunity to transition to the Orangeville ERC, where a Reception Coordinator role remains required to maintain service continuity.
- Communications will be clear, timely, and aligned with HR policies.

Stakeholder Engagement Plan:

- Internal stakeholders, including program staff, and department leads, will be informed early through direct communication channels such as team meetings and internal communications.
- Staff will be encouraged to provide feedback and ask questions throughout the transition period. External stakeholders (e.g., Employment Ontario providers, Contact North, building partners) will receive targeted updates confirming changes to service delivery and referral pathways, ensuring clarity and minimizing disruption.

Transition Plan:

- The transition will follow a structured process.
- Responsibility for these steps will be shared between Program Management, Human Resources, IT and Facilities, ensuring a seamless, well-coordinated transition.

Notification Phase:

- Provide official notice to staff; outline available placement options, including reassignment to the Orangeville ERC Reception Coordinator position.
- Notification would also need to be provided to staff on contract in the Reception Coordinator role in Orangeville.

Service Winddown:

- Update signage and redirect clients to the HART Hub and Employment Ontario.

Staff Redeployment:

- Finalize staff transfers, confirm new schedules, and complete any necessary training for the Orangeville role.

Decommissioning and Close-Out:

- Remove equipment/resources, update public communications, and complete administrative closure tasks.

Municipal Program Assessment: Communications Process Review

Department/Division: Communications Division

Executive Summary

The County remains committed to improving its communications and engagement to inform residents, stakeholders and staff and foster two-way relationships that positively impact the community and influence decision-making.

Three options are explored in this review:

- **Option A: Maintain the current service delivery model with efficiency improvements**
Implement an organization-wide communications support request intake process to enable earlier planning, clearer prioritization, and better workload/resource allocation.
Budget savings: None identified (primarily time/capacity benefits).
- **Option B: Consolidate and streamline communications-related software and subscriptions**
Example: social media management, design, and newsletter tools, to reduce duplication across the organization.
Budget savings: approximately \$3,800 in operating costs.
- **Option C: Require Council support/approval before initiating large-scale community engagement projects**
Ensure alignment with priorities and avoid investing staff time and engagement budgets in initiatives without full buy-in.
Budget savings: Avoidance of potential future spend and more efficient use of existing resources.

Department Recommendation:

Proceed with Options A, B and C. As Communications does not have its own budget, staff propose prioritizing communications processes to improve strategy and make the best use of resources/staff time, consolidating subscriptions and software and ensuring all community engagement projects are supported/approved by Council to ensure best use of budget and staff resources.

1. Current Program Overview

Program Name: Communications levels of service and service delivery and community engagement

Department/Division: CAO's Office, Communications

Legislative Mandate (if applicable): N/A

Program Description: Brief summary of the program's purpose, objectives, and target population.

Goals and Objectives:

- Improving internal and external communications falls under Governance in the Strategic Plan. Communications also provides supports to all areas across the County who are involved in moving the Strategic Plan forward and providing all programs and services.
- Communications also provides community engagement support as required.

Strengths:

- Since the launch of the County's current Strategic Plan, the Communications division has significantly increased the amount that it is communicating with staff, Council, the lower-tiers, residents and partners. Some examples include:
 - Regular informational updates, senior leadership messages, employee and team spotlights and video messages on the County's Dufferin SharePoint news page, by email and in newsletters to foster staff pride, information sharing and engagement.
 - Council toolkits including all media stories and supporting social media messages as appropriate. Council Highlights following Council meetings.
 - Proactive media outreach with media releases, service and information updates and feature stories. For example, up to mid-March, the County had distributed 13 media stories. These stories are also used for social media content.
 - The team has worked with divisions across the County to increase and improve its social media communications, fostering wider reach, increased views and followers and more engagement on its channels. Since the beginning of January 2026, the County saw an increase of 411 followers across its accounts. The County posted 142 times during this same period, earning 293,350 impressions and reaching 157,376 people.
 - Staff continue to identify new platforms to reach the County's goal of improving its internal and external communications. As part of the County's first Strategic Communications Plan, staff continue to work to develop new tactics, including the County's first corporate e-newsletter, set to launch by the end of March, and a new Join in Dufferin Page that will serve as a one-stop shop for all of the County's most frequently asked questions. Staff continue to strive to communicate in ways that make it easy for residents, staff, Council and partners to find information they require.
 - The Communications division also developed the County's Community Engagement Framework to guide all County engagement activities. This was supported with a full-day workshop for Management staff

Weaknesses:

- Staff continue to work to improve the process of information sharing and how to request communications support at the County.
- Internal and external communications guidelines and communications service levels and associated timelines were developed in 2024; however, requests for communications service often remain last minute in nature. This does not allow for strategic and creative communications planning between the Communications divisions and other teams across the County.
- Communications service requests to multiple team members via e-mail or Teams does not capture data that can assist Communications in identifying how they can improve service delivery or allocate resources more effectively.
- Another area for improvement includes identifying all the contracts the County currently has for communications software and services, including newsletters/ mailing lists, Canva subscriptions, and social media management software. Because of the County's somewhat decentralized communications function with some areas having staff who are communicating, services/software have been secured without Budget and effective service delivery being top of mind. Staff are addressing this with an audit that identifies which communications tools Divisions across the County are currently using with the goal of reducing costs and duplication. Staff have already started this project.
- In terms of community engagement, projects have gone forward over the past years that did not have full buy-in from Council, like the Climate and Emergency Management Resilience Hub, for example. In these instances, staff time and budget could have been used in improved/more strategic and meaningful ways. County suggested to ensure Council approves large scale engagements going forward as part of staff reports and budget approval.

Current Delivery Method: (e.g., direct delivery, partnerships, contract out)

2. Potential Changes

Describe areas under consideration

- Reducing or eliminating services/programs
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign and/or technology
 - The Communications division has developed a new communications support request system that they plan to roll out across the organization. This was developed after benchmarking with other municipalities that are a part of the WOWC subject matter experts communications group.
 - This service request form will allow strategic communications planning and resource allocation. It will also capture data to assist the Communications team as it works to improve its service delivery.
 - Staff are also recommending that for large scale community engagement projects, staff must seek Council support/approval before beginning the project.

- Introducing additional sources of revenue (likely the most difficult)

3. Key Performance Indicators (KPIs)

Current KPIs: Number of internal/external news stories posted, earned media coverage, social media metrics, new communications tactics identified and rolled out.

Impact on KPIs:

- Less communication or a pivot from prioritizing creativity and strategy will result in lower metrics across all categories (internal communications, earned media, social media metrics, link clicks, number of subscribers where relevant)

Data Collection Methods:

- Media and social scans, SharePoint data, web clicks, Hootsuite social media reporting, follower/subscriber growth for Join in Dufferin and new e-newsletter
- Community engagement metrics – number of attendees, participants, survey responses

Baseline Data: N/A

4. Budget and Financial Analysis

Current Budget Breakdown:

- Personnel Costs
 - n/a
- Operating Expenses
 - Software/subscriptions, approximately \$3,800 (Hootsuite, Canva, newsletter subscriptions to corporate Cyberimpact account)
- Contract Services
 - n/a
- Capital Expenditures
 - n/a

Projected Savings:

- Financial impact is minimal; however, the above noted changes will improve service delivery and ensure more strategic and effective communications and community engagement.
- By streamlining software/subscriptions, the County could save approximately \$3,800 (Hootsuite, Canva, newsletter subscriptions to corporate Cyberimpact account).

Cost-Benefit Analysis:

Streamlining and improving communication processes and information sharing would save an estimated five hours per week of the Communications and Engagement team's current time spent seeking information and background reactively or on short notice to prepare communications and provide communications and engagement advisement. This time will instead be spent focusing on strategy and increasing communications and engagement support for the organization.

Ensuring Council approval before undertaking engagement projects would ensure staff time/resources and budget are being spent consciously. It would also improve trust throughout the community if members see they can meaningfully influence Council decision-making and County programs and services. Engagement requires ongoing communication to let community members know about campaign results and decisions made.

Consolidating software and subscriptions would save an estimated \$3,800.

There is no additional cost to the organization to implement the suggested program changes.

Support Costs:

- No financial impact; however, support would be required from all divisions to adhere to new processes. Support would be required from Finance to identify all subscriptions/software to be consolidated and staff contacts to assist with transition. Communications would lead project and educate/support staff throughout program change.

5. Service Delivery Impact

- **Updated Service:**
 - N/A
- **Revised Goals and Objectives:**
 - Improve communications service delivery by focusing on improved processes to support effective and strategic communications planning and execution and data collection to support communications goals.
 - Ensure Council approval of projects before using staff resources/budget to carry out community engagement projects.
- **New Service Delivery Model:**
 - Continue with current model with improved coordination
- **Impact on Service Recipients:**
 - Communications and engagement support is a service provided to all divisions at the County. A reduction of service would impact all groups at the organization internally.
 - A reduction in communications would impact all residents, stakeholders and staff at the County. This would lead to an information gap. The organization would also fall behind on moving its strategic priority of improving communications forward; thereby limiting who it reaches across the community and organization.
 - A reduction in community engagement would limit resident and stakeholder voices being heard and reduce the impact/influence on Council decision-making. New priorities, programs and services may not reflect the needs of the community.

- **Access and Equity Considerations:**
 - A reduction in communication and engagement would affect all staff, stakeholders and Dufferin residents.
 - A reduction in communication would limit access to County services and programs due to a loss of information sharing across the community and organization.
 - Engagement may become less inclusive, accessible and meaningful. Equity-deserving groups would become harder to reach and relationships could be impacted.

6. Impact Analysis

- **Alignment with Strategic Goals:**
 - Reduced level of communications and efforts to improve internal and external communications would not support the County's strategic goals.
- **Positive Impacts:**
 - By improving communications processes, the County will have more time to be strategic in how and what it is communicating and better access to data to make decisions related to communications service delivery.
 - By ensuring Council support for engagement activities through Council approval, the County can ensure it is only executing community engagement activities for projects with support. This will save budget and staff resources for other projects.
- **Negative Impacts:**
 - Any reduction in communications or engagement could result in backlash. Communications and community engagement are essential for government service delivery, decision-making and reputation management.

7. Risk Assessment

- **Identified Risks:**
 - Any reduction in communication or engagement service level would pose a reputational risk. It could also result in lower staff morale, reduced trust from residents and partners and lower/less quality engagement from the public.

8. Compliance and Regulatory Review

- N/A

9. Stakeholder Feedback

- **External/Community Input:**
 - No feedback was collected from the community. Proposed changes mostly impact organization internally.

- **Internal Feedback:**

- Communications staff have had ongoing discussions with staff/divisional leads on how to improve service delivery. Most of the feedback received was around streamlining processes and educating staff on processes/communications levels of service.
- The Museum is responsible for most of its communications with some corporate support. Transitioning to shared software/subscriptions was a concern for quality control/proper posting to social media accounts. This is primarily related to Hootsuite. Communications recommends that the Museum maintain its own Canva account as they repurpose marketing materials and would lose access to past designs (minimal cost at approximately \$150).

10. Change Management

- **Change Management Strategy:** Outline how reduction/elimination will be communicated and managed.
- **Stakeholder Engagement Plan:** How stakeholders will be informed and involved throughout the process.
 - Communications will ensure it is communicating with impacted divisions/staff on all process, service delivery and software/subscription changes being made.
 - The Communications and Engagement team intends to meet separately with divisional teams at team meetings to go over levels of service and the appropriate way to request support.
- **Transition Plan:** Steps for winding down or transferring services, including timelines and responsible parties.
 - Changes related to communications processes will begin to be implemented immediately.
 - Any software/subscription consolidation will begin this year and be prioritized for the 2027 budget.

Municipal Program Assessment: Emergency Management Outreach Programs

Department/Division: Emergency Management Division

Executive Summary

This report reviews two components of the Emergency Management Outreach Programs - public preparedness outreach activities and the internal staff alerting platform (Alertable) - to identify efficiencies that modernize delivery while maintaining legislative compliance. The recommended direction is to refocus outreach on higher-impact, community-wide engagement and standardized/digital messaging, and to discontinue the underutilized Alertable platform. Combined, the changes are expected to provide approximately \$6,400 in annual budget savings (estimate; to be confirmed) while shifting some support work to existing Corporate Communications and IT resources.

Three options were explored in this review:

- **Option A - Discontinue Alertable**

Alertable - Internal emergency alerting platform is at contract renewal

Move towards relying on existing internal notification methods (e.g., email, Microsoft Teams, call-out lists, EOC procedures) and external alerting systems for awareness.

Budget savings: \$8,400/year - \$4,000 in operating costs plus \$4,400 in staff time that could be reallocated.

- **Option B - Scale and refocus public preparedness outreach**

Refocus by reducing participation in lower-impact in-person events and shifting toward standardized provincial campaigns, digital/self-serve resources, and centrally supported messaging.

Budget savings: \$3,900/year - \$2,400 in promotional materials plus \$1,500 in staff time that could be reallocated.

- **Option C - Implement both Option A and Option B**

Move forward as an integrated efficiency package.

Budget savings: \$12,300/year with additional staff time capacity potentially available for reallocation.

Department Recommendation:

Proceed with Option C - Implement both Option A and Option B by discontinuing the Alertable platform at contract renewal and scaling/refocusing public preparedness outreach toward higher-impact community engagement and standardized/digital messaging, for estimated savings of approximately \$12,300 per year.

1. Current Program Overview

Program Name: Emergency Management Outreach Programs

Department/Division: Office of the CAO

Legislative Mandate:

- Emergency Management and Civil Protection Act (EMCPA)
- Emergency Management Modernization Act
- Ontario Regulation 380/04
- By-Law 2022-42

Program Description:

This assessment focuses on two distinct components of the Emergency Management Program being reviewed for potential efficiencies: public preparedness outreach activities and the internal emergency alerting platform (Alertable).

Public preparedness outreach includes non-legislated, discretionary activities such as community presentations, customized workshops, and locally developed preparedness materials. These activities supplement, but are not required for, compliance under the Emergency Management and Civil Protection Act. The assessment considers reducing the scope and intensity of outreach to focus on compliance-related messaging and participation in provincially recognized campaigns, thereby preserving statutory obligations while moderating resource demands.

The internal emergency alerting platform (Alertable) is used as a supplemental notification tool for municipal staff. The platform has not been utilized operationally, and internal notifications are currently delivered through established mechanisms such as email, Microsoft Teams, call-out lists, and EOC procedures. The assessment considers eliminating the Alertable platform at contract renewal, with no anticipated impact on operational readiness or service delivery.

No other elements of the Emergency Management Program are within the scope of this assessment.

Goals and Objectives: The EM Program supports safe, resilient municipal service delivery and aligns with County strategic priorities and long-term planning.

Key objectives include:

- Maintaining compliant and operationally effective emergency plans
- Supporting departmental and municipal business continuity
- Delivering legislated training and exercises
- Promoting consistent emergency management practices across municipalities
- Ensuring compliance with provincial legislation
- Supporting continuous improvement within available capacity

Strengths:

- *Targeted Public Outreach Aligned with Compliance*
Public preparedness outreach activities have been focused primarily on supporting compliance with provincial emergency management requirements and reinforcing standardized messaging, rather than operating as a broad public education program.
- *Use of Existing Channels and Partnerships*
Outreach activities leverage existing municipal communication channels, provincial campaigns, and partner relationships, maximizing reach while minimizing duplication and incremental cost.
- *Discretionary Nature Allows Scalability*
Public outreach and customized preparedness activities are discretionary rather than legislated, allowing their scope and intensity to be adjusted without affecting regulatory compliance or core emergency management functions.
- *Redundant Internal Notification Capacity*
Multiple established internal communication tools (email, Microsoft Teams, call-out lists, and EOC protocols) are already in operational use, providing reliable redundancy for staff notification.
- *Low Operational Dependence on Alertable Platform*
The Alertable internal alerting platform has not been relied upon for operational incidents, indicating that its removal would not materially affect response readiness or internal coordination.
- *Clear Cost-Benefit Relationship*
Both areas under review represent low-cost, low-utilization components of the program, making them appropriate candidates for targeted efficiencies without creating downstream operational, legal, or service delivery impacts.

Weaknesses:

- *Limited Capacity for Sustained Public Outreach*
Public preparedness outreach is discretionary and delivered as capacity permits, resulting in limited consistency, reach, and ability to scale without drawing resources from legislated emergency management duties.
- *Resource-Intensive Customized Activities*
Community-specific presentations and tailored workshops require a disproportionate level of staff time relative to their reach, reducing overall efficiency given competing program priorities.
- *Challenges Measuring Outreach Impact*
Public preparedness activities are difficult to quantify in terms of behaviour change or risk reduction, limiting the ability to demonstrate measurable outcomes relative to resource investment.

- *Underutilization of Alertable Platform*
The internal alerting platform has not been used operationally, reducing its demonstrated value relative to its ongoing subscription cost.
- *Functional Overlap with Existing Tools*
Alertable duplicates notification functions already effectively provided through established internal communication systems, diminishing its marginal utility.
- *Ongoing Cost Without Operational Benefit*
Continued investment in a low-use platform represents a recurring expense without corresponding improvements in readiness, coordination, or response capability.

Current Delivery Method:

- The EM Program is delivered directly by 1.5 FTE through a shared-services model. Limited outsourcing is used, with the primary exception being the 9-1-1 Public Safety Answering Point.

2. Potential Changes

Describe areas under consideration:

The following areas are under consideration as part of this assessment. They are limited to specific programs and activities and are evaluated against recognized efficiency approaches, including service reduction, alternate delivery, productivity improvements, and revenue considerations.

- *Public Preparedness Outreach*
Consideration is being given to reducing the scope of discretionary public preparedness outreach activities, including customized community presentations and workshops. Outreach would be refocused on compliance-related messaging and participation in provincially recognized campaigns that support statutory obligations.
- *Internal Emergency Alerting Platform (Alertable)*
Consideration is being given to eliminating the Alertable internal alerting platform at contract renewal. The platform has not been used operationally and provides limited additional value beyond existing internal communication methods.

Providing Services Using Alternate Delivery Methods

Public Preparedness Outreach

Preparedness messaging could be delivered through alternate, lower-resource methods such as:

- Use of standardized provincial materials and campaigns
- Digital and self-serve resources hosted on municipal websites
- Integration of preparedness messaging into existing municipal communications

These approaches maintain access to information while reducing staff time and customization requirements.

Internal Staff Notifications

Internal emergency notifications would continue to be delivered through established tools already in use, including email, Microsoft Teams, call-out lists, and Emergency Operations Centre procedures, eliminating reliance on a dedicated third-party platform.

3. Key Performance Indicators (KPIs)

Current KPIs (2025):

- Public Outreach Events – 11
- Individuals engaged – 1803
- Emergency/Event Notifications – 41
- Alertable Notifications Issued – 0

Impact on KPIs:

KPI targets will require recalibration to align with the revised service model, and performance should be closely monitored during the transition to identify unintended impacts and inform mitigation strategies.

Data Collection Methods:

- KPIs are recorded by staff in real time.

Baseline Data:

Quantitative baseline data is limited for certain performance measures. Where direct metrics are unavailable, qualitative information, historical trends, and operational experience have been used to establish a reasonable baseline. Identified data gaps will be noted and monitored as part of the transition.

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs

- Approximately 70 hours per year, \$5,100 in staff time for Public Preparedness Outreach
- Quarterly training sessions for multiple staff related to Alertable app, \$4,400

Operating Expenses

- Promotional materials, \$2,400
- Alertable annual fee, \$4,000

Contract Services: n/a

Capital Expenditures: n/a

Projected Savings:

- Alertable elimination: \$4,400 in staff time that could be allocated to other areas plus \$4,000 for the Alertable app
- Public education scaling: \$1,500 in staff time that could be allocated to other areas plus \$2,400 in promotional material

Cost-Benefit Analysis:

- While short-term savings total approximately \$6,400, reductions to preparedness and mitigation activities carry disproportionate long-term financial, operational, and compliance risks.

Support Costs:

- The revised service model will rely more heavily on Corporate Communications and Information Technology to maximize the use of online resources and standardized public education campaigns.

5. Service Delivery Impact**Updated Service:**

Under the revised service model, staff participation in public events will be reduced by approximately 30%, resulting in fewer in-person engagements and a corresponding reduction in the distribution of promotional materials such as flashlights and brochures. Staff attendance at community events will become more strategic and selective, with priority given to events that attract participants from the broader community and offer the greatest opportunity for awareness and education. Increased emphasis will be placed on maximizing impact through targeted event selection and complementary use of online and standardized public education resources.

Revised Goals and Objectives:

- Focus staff outreach efforts on high-impact public events that reach a broad cross-section of the community.
- Reduce overall participation in in-person public events by approximately 30%, while maintaining program visibility and effectiveness.
- Shift from quantity-based outreach (number of events and materials distributed) to impact-based engagement.
- Decrease reliance on physical promotional materials (e.g., flashlights, brochures) and increase use of online resources and standardized public education materials.
- Support consistent, municipality-wide messaging through collaboration with Corporate Communications.
- Optimize staff time and resources by prioritizing activities that deliver the greatest public education value.

New Service Delivery Model:

The service will continue to be delivered through direct municipal staff engagement, with a revised focus on strategic, high-impact outreach rather than broad in-person participation. Delivery will place greater emphasis on select attendance at key community events, complemented by expanded use of online information, digital resources, and standardized public education campaigns developed in coordination with Corporate Communications. This model shifts emphasis from event-based distribution of materials to broader,

technology-enabled information sharing, improving efficiency while maintaining community reach.

Impact on Service Recipients:

Service recipients will experience fewer in-person outreach opportunities, particularly residents who primarily access information through smaller, localized community events. Individuals attending these events may also receive fewer physical promotional materials, such as flashlights and brochures. However, residents who participate in larger, community-wide events are expected to continue to be reached through more focused and strategic staff attendance. For the broader community, access to information will increasingly be supported through online resources and standardized public education materials, helping to maintain overall awareness while using staff and resources more efficiently.

Access and Equity Considerations:

The reduction in staff attendance at public events may disproportionately affect residents who rely on smaller, localized events or in-person interactions as their primary source of information, including some seniors, individuals with limited digital access, or residents in more remote or underserved areas. To mitigate potential equity impacts, event selection will prioritize larger, community-wide events that attract diverse audiences, and information will continue to be made available through accessible online resources and standardized public education materials. Ongoing monitoring will be required to ensure that key messages remain accessible to all residents and that no specific groups experience unintended barriers to information access.

Quality Assurance Measures:

Service quality will be maintained through a more strategic and standardized approach to public education delivery. Messaging and materials will be developed centrally, in collaboration with Corporate Communications, to ensure accuracy, consistency, and alignment with municipal standards. Online content will be regularly reviewed and updated to reflect current information and best practices. Staff participation in selected high-impact events will continue to provide opportunities for direct engagement and feedback, while performance indicators (e.g., reach, usage of online resources, and community feedback) will be monitored to identify gaps and support continuous improvement during the transition.

6. Impact Analysis

Alignment with Strategic Goals:

The proposed service delivery changes are aligned with Dufferin County's 2023–2026 Strategic Plan and support Council-endorsed priorities, particularly within the Governance, Community, and Equity focus areas.

By shifting toward more strategic, high-impact engagement and greater use of digital and standardized public education tools, the County is advancing the Strategic Plan objective of improving service delivery and internal and external communications while using resources more efficiently.

The revised approach supports the Community priority by continuing to promote public well-being and safety through targeted outreach that reaches a broad cross-section of residents, while leveraging partnerships and modern communication methods to maintain awareness. Increased reliance on online resources and centralized messaging also supports Equity goals by aligning programs and services with changing community needs and enabling consistent, accessible information sharing across the County.

Overall, these changes reflect Council direction and contribute to the Strategic Plan's long-term objectives related to modernization, organizational effectiveness, and responsible stewardship of public resources, while remaining responsive to community needs.

Positive Impacts:

The proposed changes are expected to improve operational efficiency by focusing staff efforts on higher-impact outreach activities, while achieving modest cost savings through reduced event participation and fewer physical promotional materials. Increased use of standardized messaging and digital channels will enhance consistency, modernize service delivery, and support broader community reach with existing resources.

Negative Impacts:

The proposed changes may result in reduced in-person outreach opportunities, particularly at smaller or localized events, which could limit direct engagement with some residents. There is potential for community concern or perception of reduced visibility, and increased reliance on digital channels may pose challenges for individuals with limited access to or comfort with online resources.

7. Risk Assessment

Identified Risks:

- Operational risk: Reduced in-person outreach may limit direct engagement opportunities with some segments of the community.
- Reputational risk: Perception of reduced visibility or support if changes are interpreted as service withdrawal.
- Equity risk: Increased reliance on digital channels may affect residents with limited access to or comfort with online resources.
- Change-management risk: Transitioning to a more selective outreach model may require adjustment by staff and stakeholders.

Mitigation Strategies:

- Prioritize attendance at high-impact, community-wide events to maintain visibility and engagement.
- Use clear, proactive communications to explain service changes and emphasize continued commitment to public education.
- Ensure key information is provided through multiple accessible channels, including online, centralized messaging, and select in-person engagement.
- Monitor feedback and performance indicators to identify issues early and adjust the approach as needed.

8. Compliance and Regulatory Review

Regulatory Requirements:

The *Emergency Management and Civil Protection Act* (EMCPA) requires municipalities to undertake public education activities related to potential hazards and risks within the community. The legislation provides municipalities with significant flexibility to determine the appropriate nature, frequency, and scope of these public education efforts.

The EMCPA also requires municipalities to establish processes for the emergency notification of staff and key stakeholders. Municipalities retain discretion to select the tools, tactics, and technologies used to support these notification processes, provided they are appropriate and effective.

Compliance Status:

- The County of Dufferin and each of the partner municipalities are fully compliant with the 13 requirements of the EMCPA and these efficiencies will not compromise that status.

Legal Implications:

- The proposed reduction and refocusing of program activities does not eliminate these functions and is not expected to create legal risk, provided that public education and notification obligations continue to be met through a combination of targeted in-person engagement, digital resources, and standardized communications.
- There are no additional statutory duties, contractual obligations, or liabilities anticipated as a result of the revised service model.

9. Stakeholder Feedback

External/Community Input:

- Summary of feedback from residents, community groups, or stakeholders regarding the proposed change.

Internal Feedback:

- Input from department heads, program staff, and other internal stakeholders.

10. Change Management

Change Management Strategy:

- Given the limited scope of the proposed efficiencies, only minimal change management efforts will be required. Communication will focus on maintaining clarity and transparency, with targeted engagement as necessary.
- Ongoing monitoring and periodic review will continue to ensure alignment with evolving provincial requirements.

Stakeholder Engagement Plan:

- Elimination of the Alertable platform will remove the Emergency Management team's ability to issue direct alerts to staff.
- However, staff who continue to have the application installed on their devices will still receive alerts issued by external authorities, including the OPP, Environment and Climate Change Canada, Emergency Management Ontario, and the national Alert Ready system.
- Given the internal and low-impact nature of the discontinuation, no stakeholder engagement is required.

Transition Plan:

Alertable Platform Discontinuation:

- The existing contract for the Alertable platform will be allowed to expire and will not be renewed at the end of the current contract term. Responsibility for contract wind-down and system access will rest with the Emergency Management team, in coordination with Corporate Procurement and IT as required. No service transfer is required.

Continuation of Alerting Coverage:

- Staff will continue to receive emergency alerts through external platforms (e.g., OPP, Environment and Climate Change Canada, Emergency Management Ontario, and Alert Ready), minimizing transition impacts.

Community Engagement Events:

- A business practice for staff participation in community engagement events will be developed to guide event selection, attendance criteria, and resource use under the revised service model. This work will be led by the Emergency Management team, with input from Corporate Communications, and completed within the next planning cycle.

Monitoring and Review:

- The transition will be monitored to ensure operational continuity, with adjustments made as required based on experience and evolving needs.

**Municipal Program Assessment:
Bill Hill Scholarship Program**

Department/Division: Clerks Division

Legislative Mandate: None (discretionary program)

Executive Summary

The Bill Hill Scholarship Program is a discretionary recognition initiative administered by the Clerks Division, providing one-time financial awards to Dufferin County students pursuing post-secondary education. While the program generates positive community goodwill, it is not mandated, has limited measurable outcomes, and requires administrative effort disproportionate to its scale.

Three options have been evaluated as part of the County's broader review of discretionary services:

- **Option A – Eliminate the Program:**
Ends a non-essential initiative, producing modest savings and reducing staff workload, but may create perception concerns related to reduced youth support.
Budget savings: \$22,000
- **Option B – School-Nomination Model:**
Retains the scholarship while improving fairness, integrity, and workload management through educator-validated nominations and standardized criteria.
Budget savings: None, with reduction to staff time.
- **Option C – Transfer Administration to the Dufferin Community Foundation (DCF):**
Shifts program delivery to a community-based organization experienced in administering bursaries and donor-advised funds, enhancing sustainability and process integrity while reducing internal administrative burden.
Budget savings: None, with reduction to staff time.

Department Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Bill Hill Scholarship

Department/Division: Clerks Division

Legislative Mandate: None – discretionary and not required under provincial or federal legislation.

Program Description:

This recognition program (est. 2015) provides one-time financial awards to outstanding Dufferin County students pursuing post-secondary education and/or training. The program is symbolic/recognition-based rather than a legislated service delivery function.

Goals and Objectives: Recognize academic achievement and community involvement; reinforce community values related to education, leadership, and civic pride. The program is not directly tied to an approved County service plan or performance framework.

Strengths: Modest financial investment; positive community recognition and goodwill.

Weaknesses: Limited measurable community impact; benefits a small number of residents; administrative effort is disproportionate to program size; self-identified streams have attracted comments about potential misuse.

Current Delivery Method: Direct delivery by the Clerks Division.

2. Potential Changes

Option A — Eliminate the Scholarship Program

- Rationale: Not mandated; limited outcome measurement; administrative burden disproportionate to program size; modest fiscal savings achievable.
- Scope of Change: Discontinue awards and associated activities (promotion, intake, evaluation, reception, and payments).
- Transition: Provide clear public rationale, notify schools and prior stakeholders, and close out any pending commitments for the current cycle.

Option B — Convert to School-Nomination (replace self-nomination)

- Rationale: Improves fairness and integrity; addresses concerns about self-identified streams; introduces educator verification and quality control; may reduce staff workload via capped nominations per school.
- Scope of Change: Require each secondary school to nominate up to a set number of candidates using a concise template and documented criteria; central evaluation with a streamlined matrix.
- Transition: Provide a nomination toolkit to schools (criteria, timelines, forms); offer brief info sessions for guidance leads; Council will still have final decision

Option C — Have Dufferin Community Foundation (DCF) Administer the Program

- Rationale: DCF specializes in managing donor-advised funds, distributing grants and bursaries, and stewarding community-focused financial supports, leveraging permanent endowment funds designed to support local needs over time.
- Scope of Change: Transfer administration of the Bill Hill Scholarship to DCF, including application intake, evaluation, and recipient selection. Establish a dedicated Bill Hill Scholarship Fund or place the scholarship within an existing donor-advised structure alongside other bursary programs.

- Transition: Initiate formal discussions with DCF about creating or integrating the scholarship fund, confirming investment structure, administrative roles, timelines, and cost implications, and develop an agreement outlining fund governance, nomination or application pathways, annual reporting expectations, and communication responsibilities.

3. Key Performance Indicators (KPIs)

Current KPIs:

- Applications:
- 2023: 29 applications
- 2024: 32 applications
- 2025: 26 applications

Schools Represented:

Year	Centre District SS	Orangeville District SS	Westside SS	Robert F Hall SS	Other
2023	1	2	2	1	0
2024	4	1	1	1	0
2025	1	2	3	0	1

Outcomes:

- No formal KPIs track post-secondary completion, workforce impact, or community return.

Proposed KPIs (if Option B proceeds):

- Reach & Representation: Number of participating schools; nominees per school; geographic balance.
- Process Quality: Percentage of complete nominations on first submission; average evaluation time per file.
- Outcome Proxies: Recipient feedback on award impact: Collect insights on how the scholarship influenced the student’s ability to begin or continue studies

Proposed KPIs (if Option C proceeds):

- Reach & Representation: Number of participating schools; nominees per school; geographic balance.
- Process Quality: DCF compliance with fund administration standards: Confirm adherence to fund policies and established granting practices.
- Outcome Proxies: Recipient feedback on award impact: Collect insights on how the scholarship influenced the student’s ability to begin or continue studies.

4. Budget and Financial Analysis

Current Budget Breakdown:

- \$17,500 — Scholarships awarded
- \$1,500 — Reception to present the scholarships
- Staff Time, approximately 15 hours annually, \$860 — Promotion to schools; communications; applicant inquiries; annual application updates and posting; intake and follow-up; evaluator coordination; scoring matrix preparation; evaluation meeting; event planning; payments to recipients/schools.

Projected Savings:

- If Option A (Eliminate): Approximately \$22,000 annually (direct costs plus associated supports).
- If Option B (Nomination): Reduced administrative time, approximately \$400 from lower application volume and standardized packages (qualitative savings; to be tracked in Year 1).
- If Option C (Administer through DCF): Reduced staff administrative time, however there would be cost associated with DCF administering the program.

Cost–Benefit Analysis:

- Financial savings are modest.
- Option B and C preserves recognition value while improving process integrity and may reduce staff workload.

Support Costs:

- Communications (messaging, notices, media release)
- Finance (payment processing; stipend routing)
- People & Equity (matrix review, process oversight, and equity lens)

5. Service Delivery Impact

Updated/Resulting Service:

- Option A: No ongoing service; program is wound down.
- Option B: Scholarship service is retained with a school-nomination delivery model.
- Option C : Delivery would be framed within DCF’s broader mission of long-term community investment through donor-advised endowment funds.

Revised Goals and Objectives:

- Option A: Not applicable (program discontinued).
- Option B: Provide targeted recognition and financial support to local students via a fair, educator-validated nomination process.
- Option C: The overarching aims of the scholarship would remain consistent—supporting student success and reinforcing community values.

New Service Delivery Model:

- Option A: None.

- Option B: School nomination; standardized criteria and concise nomination package.
- Option C: Fund management and award decisions become part of DCF’s donor-advised fund processes, while the County’s role becomes sponsorship, funding, and public recognition—not operational delivery.

Impact on Service Recipients:

- Option A: Students will no longer access this County scholarship; may seek external scholarships and financial aid instead.
- Option B: Students apply through their school; some who would have self-applied may not secure nominations
- Option C: The shift to DCF may reduce confusion for students, since DCF already presents multiple bursary opportunities in one place.

Access and Equity Considerations:

- Current State: Program benefits a limited and competitive pool; no financial-need criterion in place; alternative support exists externally.
- Option A: Elimination is unlikely to disproportionately affect vulnerable populations given the limited scope and lack of need-based criteria.
- Option B: Embed equity safeguards (transparent criteria, optional context statement, educator training, and equity nomination path).
- Option C: Embedding the scholarship within DCF’s framework may improve equity by leveraging school-based review committees and DCF’s experience administering bursaries aimed at reducing financial barriers.

Quality Assurance Measures:

- Option A: Not applicable.
- Option B: Use a standardized scoring matrix, conflict-of-interest declarations for evaluators, and annual review across schools.
- Option C: Require annual reporting on fund performance, award criteria compliance, and recipient outcomes.

6. Impact Analysis

Alignment with Strategic Goals:

- The scholarship is a discretionary recognition initiative; while aligned with broad community values (education, leadership, community pride), it is not tied to an approved County service plan or performance framework.

Impacts (Positive/Neutral):

- Option A: Cost savings and removal of a recurring administrative burden.
- Option B: Maintains recognition benefits, improves process integrity, and streamline administration.

- Option C: Improved process integrity and enhanced long-term stability by embedding the scholarships through the DCF endowment-based model, while continued County recognition of this legacy program.

Potential Negative Impacts:

- Option A: Perception of reduced support for youth/education and loss of a legacy program associated with a former Warden.
- Option B: Added workload for school staff; potential barriers for students without strong school advocacy.
- Option C: Reduced direct control of Council for the award of the scholarships, along with administrative costs for the fund management.

7. Risk Assessment

Identified Risks:

- Loss of a politically sensitive legacy program (public perception and stakeholder expectations), if Option A is chosen.
- Potential barriers for students without strong school advocacy, if Option B is chosen.
- Loss of full Council oversight, and uncertainty regarding long-term fund performance if Option C is chosen.

Mitigation Strategies:

- Clear communications framing decisions within broader program reviews and fiscal constraints.
- If Option A proceeds: provide a list of alternative external scholarship resources and ensure ample notice ahead of the next cycle.
- If Option B proceeds: standardized criteria, training for school nominators, capped nominations per school, and conflict-of-interest declarations.
- If Option C proceeds: development of a detailed fund administration agreement that outlines expectations for annual reporting, criteria compliance, communication responsibilities and recognition.

8. Compliance and Regulatory Review

- Regulatory Requirements: None known/applicable.
- Compliance Status: Not applicable.
- Legal Implications: None identified.

9. Stakeholder Feedback

External/Community Input:

- No formal community input has been gathered to date.

Internal Feedback:

- Clerks Division notes administrative considerations and disproportionate effort for the program scale.
- An evaluation committee member (last year) observed that the current structure may not reach families most in need and that self-identified streams could be abused.
- Program does not align well with current service mandates under financial pressures.

10. Change Management

Change Management Strategy:

All changes should be positioned within the County’s ongoing efforts to review discretionary programs, improve service alignment, and ensure responsible use of resources. Framing the change within this larger County narrative will help stakeholders understand the rationale and reduce resistance.

Across all options, messaging should consistently emphasize:

- Stewardship of public resources
- Commitment to fairness, integrity, and community support
- Transparency in decision-making
- Continued recognition of student achievement (where applicable)

Option-specific Themes:

- Option A: Necessity of eliminating non-essential discretionary programs during fiscal pressures; availability of external scholarships.
- Option B: Improved fairness, reducing misuse concerns; educator-based validation enhances integrity.
- Option C: Strengthening the program through partnership with a community-based foundation; sustainable long-term stewardship.

Stakeholder Engagement Plan:

Stakeholder engagement would need to begin before implementation and continue throughout the transition cycle.

- Clear initial notice of Council’s decision
- Direct communications to school administrators and guidance departments
- Website updates, media releases, and FAQs tailored to the selected option
- Meetings or information sessions (particularly necessary for Option B and C)
- Coordinated messaging with DCF if Option C is chosen

Transition Plan:

Option A — Eliminate the Program

- Provide formal public notification and direct communication to schools.
- Remove scholarship materials from the County website.
- Provide a curated list of external scholarships to support students.

Option B — School-Nomination Model

- Updated nomination criteria, scoring matrix, and nomination caps, if any.
- Develop and distribute a school nomination toolkit (criteria, forms, timelines).
- Host a briefing session for guidance staff.
- Implement new intake and evaluation workflows.
- Consider low-cost recognition formats in place of a reception.

Option C — Transfer to Dufferin Community Foundation

- Initiate formal discussions with DCF regarding fund establishment or integration.
- Develop a written administration agreement covering governance, annual reporting, communication roles, and fund performance expectations.
- Transfer all public-facing guidance (web content, application instructions) to DCF channels.
- Notify schools and the public about the new administration model.

**Municipal Program Assessment:
Dufferin County Community Grant Program**

Department/Division: Office of the CAO/Clerks/Council
Legislative Mandate: None (discretionary community program)

Executive Summary

The Dufferin County Community Grant Program is a discretionary initiative that provides financial support to not-for-profit- and charitable organizations advancing County priorities, including community wellbeing, equity, food security, arts and culture, youth programming, and environmental initiatives.

It should be noted that the Food for Thought Grant Program (FFTG) was not included in this review. The FFTG program provides direct funding (\$98,000) to the County's three local food banks (Orangeville - \$70,000, Dufferin Food Share - \$14,000 and Shepherd's Cupboard- \$14,000) and operates with minimal administrative requirements. Due to its streamlined delivery model and well-documented, high community benefit in addressing food insecurity, the program was considered out of scope for this assessment and remains distinct from the broader Community Grant Program review.

Three delivery options were evaluated:

- **Option A - Maintain the status quo**
Preserving established processes but continuing staff workload and reliance on HCIA.
Budget savings: None
- **Option B - Transition administration to the Dufferin Community Foundation**
Potentially increasing philanthropic alignment but with unknown costs and transition risks.
Budget savings: None, possible reduction in staff time
- **Option C - Eliminate the program**
Delivering financial savings but resulting in significant community and reputational impacts, particularly for grassroots and equity deserving groups.
Budget savings: \$157,500 total (\$140,000 grant envelope + \$17,500 HCIA administration) with County staff time savings

Department Recommendation:

For the consideration of Council.

Important Considerations

Data-Driven Decision Making:

This review uses multi-year performance and workload data from the 2022/2023/2024 Grant Assessment Reports, and the 2025 HCIA Year-End Deliverables Report.

Transparency and Communication:

Community grants are highly visible and directly connected to community well-being. Any changes to the program must be clearly communicated to ensure trust and to avoid the perception that community support is being withdrawn.

Consider Alternatives:

Given the program's discretionary nature and increasing administrative complexity, this review evaluates several service delivery options, including maintaining the current HCIA-administered model, transferring administration to the Dufferin Community Foundation, implementing automation enhancements, or full program elimination.

1. Current Program Overview

Program Name: Dufferin County Community Grant Program

Department/Division: Clerks Division (with support from Communications & Finance)

Legislative Mandate: None. The program is a discretionary community investment initiative, not required under legislation.

Program Description:

The Community Grant Program provides financial support to not-for-profit and charitable organizations delivering projects that align with Dufferin County's strategic priorities. These include community wellbeing, DEI, climate and environment, cultural enhancement, economic development, food access, and youth/seniors supports. Grants are assessed and administered through a partnership with Headwaters Communities in Action (HCIA), which delivers the end-to-end process from intake through scoring recommendations and recipient storytelling.

This review does not include the Food for Thought Grant, which provides funding to the three local food banks.

Goals and Objectives:

- Support community priorities through targeted funding.
- Strengthen organizations that deliver measurable community benefit.

- Ensure transparent, consistent, and equitable allocation of public funds.
- Provide a streamlined and accessible application and assessment process.

Strengths:

- Strong alignment with County priorities (community, governance, climate, equity, economic development).
- Structured funding streams (Grassroots, Bloom, Groundwork) support organizations at different stages of maturity.
- HCIA's administration improves process consistency.
- Demonstrated multi-year positive impact across Dufferin in food security, arts, youth, and community building.

Weaknesses:

- Heavy reliance on HCIA staff capacity while HCIA supports many County programs.
- Declining application volumes (2025 saw a 52% decrease over 2024).
- Annual funding demand consistently exceeds available funds (e.g., 2022 requests exceeded available funds by 35%; same in 2023).
- County staff time (20–30 hours/year) required for coordination, communications, and payment administration remains significant.

Current Delivery Method:

Hybrid model: HCIA delivers the full application, assessment, and recommendations process; County staff support promotion, intake, communications, and disbursements.

2. Potential Changes

OPTION A — Maintain Status Quo (HCIA Administration)

Summary:

- Continue the current HCIA administered model, retaining the partnership and overall service structure.

Advantages:

- No service disruption.
- Strong community alignment and history of success.
- Established administrative processes refine annually.

Challenges:

- Staff are still quite involved as staff time remains approximately 20–30 hours annually.
- \$17,500 cost for HCIA to administer

OPTION B — Transition Administration to Dufferin Community Foundation (DCF)

Summary:

- Transfer responsibility for grant administration to DCF, which already manages the Museum of Dufferin Endowment.

Advantages:

- Potential for philanthropic alignment and expansion of community funding.
- May reduce County administrative time.

Challenges:

- Cost of DCF administration unknown;
- Loss of HCIA’s integrated alignment across County programs
- Potential disruption during transition.

OPTION C — Eliminate the Program

Summary:

- Fully discontinue community grant funding.

Advantages:

- Financial savings (grant envelope + staff time + HCIA allocation).

Challenges:

- Major community and reputational impact.
- Loss of a core community support mechanism.
- Disproportionate impact to grassroots organizations and equity-seeking groups.

3. Key Performance Indicators (KPIs)

Current KPIs:

- **Applications per year:**
 - 2022: 35 applications
 - 2023: 34 applications
 - 2024: 54 applications
 - 2025: 26 applications
- **Funding awarded:**
 - 2022: \$120,000
 - 2023: \$120,000
 - 2024: \$95,000 (amount decreased from previous years due to removing food banks from the program and just providing funding directly to them without the need to complete an application)
 - 2025: \$122,630 (\$140,000 available, \$10,000 accounted for from previous multi-year grants – lower number of applications, leaving \$7,370 unused)

Alignment with County strategic priorities

Number of applications

(Community includes: Youth & Seniors/Cultural Enhancements/Food)

- 2025: 19 – Community / 2- Climate and Environment
- 2024: 28- Community /5-Equity/ 2-Economy/ 1 Climate and Environment

- 2023: 14 -Community/ 6-Equity/ 1-Economy/ 1-Climate and Environment
 - 2022: 16-Community / 6 Equity/ 3- Economy/ 2- Climate and Environment
- Sector reach and equity distribution of grants-(AI generated analysis is attached – Appendix 1)
- Volume and quality of recipient impact stories.

Impact on KPIs if Changes Adopted:

- **Option A:** KPIs remain stable; demand continues to fluctuate.
- **Option B:** May enhance capacity, but KPIs depend on Dufferin Community Foundation processes.
- **Option C:** KPIs cease; removal of community funding support.

Data Collection Methods:

HCIA annual reporting, County staff grant tracking, Typeform data, and recipient follow-up .

Baseline Data:

Four-year trend demonstrates application volatility but consistently high community demand for funding.

4. Budget and Financial Analysis

Current Budget Breakdown:

- County Staff Time: 20–30 hours/year (Clerks Office + Communications + Finance)
- Operating Expenses: Typeform annual software subscription, communications, payment processing
- Contract Services: HCIA administrative role supported through annual allocations (\$17,500)
- Community Grants Awarded - \$140,000 is allocated to the program

Projected Savings:

- **Option A:** None
- **Option B:** Possible reduction in staff time; cost of DCF administration unknown. (Do not want to reach out to DCF unless Council gives direction)
- **Option C:** Savings equal to grant envelope (\$140,000) + staff time + HCIA administrative cost(\$17,500) - Approximately \$160,000

Cost–Benefit Analysis:

The program produces extensive community benefits, demonstrated by strong multi-year impact stories and cross-sector returns (food security, arts, youth supports). Removing the program delivers limited financial savings relative to the community loss.

Support Costs:

Communications, Finance (payments), Clerks Office (administration)

5. Service Delivery Impact

Updated/Resulting Service by Option:

Option A: Continuation of current grant program with HCIA administering.

Option B: DCF becomes the new grant administrator; would require negotiation of scope, cost, and separation from County's existing HCIA partnership.

Option C: Service discontinued.

Revised Goals and Objectives:

The goals and objectives would remain the same if Council decided to keep the program regardless of if it was administered by HCIA or DCF.

New Service Delivery Model:

- **Option A:** Hybrid County–HCIA model remains
- **Option B:** Third-party philanthropic administration
- **Option C:** None.

Impact on Service Recipients:

- **Option A:** Maintains consistent access to grants.
- **Option B:** Recipients may benefit from DCF's philanthropy networks, but application processes may change.
- **Option C:** Loss of significant community funding source.

Access and Equity Considerations:

Grassroots organizations (often serving equity-deserving groups) rely heavily on the program's lower-barrier streams. Discontinuation would have disproportionate impacts.

Quality Assurance Measures:

HCIA's scoring matrix, assessor diversity, and software-supported review process provide quality controls. DCF would require its own assurance framework.

6. Impact Analysis

Alignment with Strategic Goals:

The program strongly supports community, equity, climate, economic development, and governance goals outlined in County priorities.

Positive Impacts:

Option A:

- Maintains consistent access to grants and avoids service disruption for community organizations.
- Continues strong alignment with County strategic priorities (community wellbeing, equity, climate, economic development).

- Preserves established processes and HCIA’s integrated experience across County programs.
- Sustains a broad reach across sectors including youth, arts, food security, seniors, mental health, and DEI programs.

Option B:

- Potential for expanded philanthropic alignment that may increase overall funding available to the community.
- May reduce County administrative burden if DCF assumes a greater share of administrative activities.
- Recipients may benefit from DCF’s networks, fundraising capacity, and community relationships.

Option C:

- Provides financial savings by removing the grant envelope, staff time, and HCIA administrative allocation.

Negative Impacts:

Option A:

- Administrative workload remains significant County staff (20–30 hours annually).
- The program continues to face limited funding relative to community demand.

Option B:

- Administrative costs for DCF are unknown
- Loss of HCIA’s integrated coordination across multiple County programs, reducing alignment.
- Potential service disruption during the transition, including changes to application processes and timelines.
- KPIs and service outcomes may shift depending on how DCF structures review, assessment, and reporting.

Option C:

- Eliminates a core community support mechanism serving youth, seniors, food security, arts, DEI, mental health, and grassroots groups.
- Disproportionately harms equity seeking and grassroots organizations that rely on this low barrier funding.
- Could increase pressure on other County services as organizations lose operational supports. (Implied by loss of a core support mechanism.)

7. Risk Assessment

Identified Risks:

Option A:

- Operational risk if HCIA staff capacity becomes strained due to their involvement in multiple County programs, and County staff is at capacity for the program.

Option B:

- Unknown administrative costs, which may exceed the current HCIA allocation and create budget risks.
- Loss of HCIA's integrated alignment with other County programs, which may reduce program coherence and cross-program benefits.
- Potential service disruption during transition, affecting applicants, timelines, and assessment processes.

Option C:

- Major community impact, especially for grassroots and equity seeking groups who rely heavily on low barrier funding.
- Increased pressure on other County services, as organizations lose funding for essential programming.

Mitigation Strategies:

Option A:

- Conduct ongoing process reviews with HCIA to manage workload and strengthen administrative efficiency.
- Explore automation or digital improvements to reduce manual staff workload.

Option B:

- Obtain a formal proposal from DCF outlining scope, costs, data requirements, and performance expectations before proceeding.
- Develop a detailed service contract to define responsibilities, timelines, and application processes.
- Coordinate knowledge transfer between HCIA and DCF to maintain program continuity.
- Implement a phased transition plan with clear, proactive communication to applicants and partners.

Option C:

- Provide early, clear, and compassionate notice to grant recipients and sunset multiyear commitments.
- Deploy a strong public communication strategy to explain rationale and acknowledge community impacts.
- Offer guidance to organizations on alternative funding sources where possible to reduce operational disruptions.

8. Compliance and Regulatory Review

- No applicable municipal, provincial, or federal legislation.
- The program is discretionary and may be modified or discontinued by Council.

9. Stakeholder Feedback

External/Community Input:

Strong evidence of community reliance demonstrated through 2022–2025 recipient impact stories. Dufferin County Community Grant has been describe as a low barrier funding that has significant impact in the ecosystem of grants available.

Internal Feedback:

Staff note administrative burden and the potential value of automation and/or alternate delivery models.

10. Change Management

Change Management Strategy:

Align messaging with broader program reviews, community well-being goals, and fiscal stewardship.

Stakeholder Engagement Plan:

To strengthen the effectiveness of engagement, the County will adopt a proactive and relationship based approach that ensures stakeholders remain informed, consulted, and supported throughout any program changes. Engagement activities will prioritize transparency and predictability by providing clear timelines, outlining decision making stages, and offering opportunities for feedback prior to implementation. Public facing communications—through the County website, media releases, and community networks—will focus on clarity, accessibility, and reinforcing the County's ongoing commitment to community wellbeing.

Transition Plan:

Option A — Maintain Status Quo (HCIA Administration)

- Minimal transition required; continue with the current hybrid County–HCIA model.
- Maintain established workflows for promotion, intake, assessment, communications, and payment processing.
- Conduct post cycle reviews with HCIA to refine processes and address administrative load.

Option B — Transition Administration to Dufferin Community Foundation (DCF)

- Develop a service contract outlining scope, deliverables, timelines, data requirements, and performance expectations; administration costs must be confirmed.
- Coordinate with HCIA to close out current program responsibilities and ensure knowledge transfer.
- Co-develop communications (County + DCF) to inform applicants of process changes and transition timelines.

Option C — Eliminate the Program

- Provide formal notice to recipients and sunset any existing multi-year funding commitments.
- Wind down administrative activities with HCIA and reconcile remaining obligations.
- Implement a clear communication strategy to address community and reputational impacts, particularly for equity-seeking and grassroots groups.

APPENDIX 1 – Sectors Reached And Distribution

1. SECTORS REACHED (BY YEAR & ACROSS ALL YEARS)

To determine “sectors reached,” I mapped each application’s description to a **sector of service**, using the program summaries in the reports.

This is directly supported by detailed project descriptions in **the Grant Assessment Reports submitted to Council from HCIA for 2022-2025**

A. CONSOLIDATED SECTORS REACHED (2022–2025)

Primary Sectors Identified

Sector	Example Programs	Support in Reports
Youth Development & Mentorship	Big Brothers Big Sisters, Youth Arts, Youth Wellness, School programs	Consistent across all four years (2022–2025).
Food Security / Nutrition	Food For You, Meals on Wheels, School snack programs, Community kitchens, Good Food Projects	High volume in 2023–2025; also consistently present in 2022.
Arts, Culture & Heritage	Theatre Orangeville, Headwaters Arts, Festivals, Cultural groups	Significant presence every year.
Mental Health & Therapeutic Services	Fiddlehead Care Farm, TeleCheck, crisis supports	Growing strongly from 2023 onward.
Seniors’ Services	Seniors wellness programs, congregate meals, social isolation reduction	Prominent in 2022–2025.
DEI / Equity-Focused Community Support	DCCBA, Cultural Resource Circle, Celebrate Your Awesome, DEI training, Multicultural events	High representation across all years.
Environmental & Climate Initiatives	Bee Ambassadors, school Eco programs, conservation activities	Present but lower volume each year.
Sports, Recreation & Community Wellness	Cricket clubs, hiking programs, music programs	Present every year.
Community Capacity Building / Nonprofit Strengthening	Nonprofit appreciation events, organizational development, sustainability funding	Especially highlighted in 2023–2024.

B. 4-YEAR TREND IN SECTORS

Sector Growth Patterns

- **Food Security** → surging (highest growth 2023–2025)
Report evidence: multiple school food programs, Meals on Wheels, Good Food Project, Community Tables.
- **Mental Health Supports** → sharply rising
E.g., Fiddlehead Care Farm expansions (2023, 2024, 2025). TeleCheck growth (2023–2025).
- **DEI / Inclusion Work** → consistently strong
DCCBA, Cultural Resource Circle, Celebrate Your Awesome, various multicultural and anti-racism programs.
- **Environmental Sector** → stable but limited
Typically 1–2 programs per year.
- **Youth Programs** → remain the most consistently represented sector.

2. EQUITY OF DISTRIBUTION (EQUITY-FOCUSED ANALYSIS)

This is derived from:

- Strategic Priority alignment categories in each report (DEI, Equity, Inclusion, etc.)
- The populations served as stated in project descriptions.
- Assessment Team comments regarding equity prioritization.

A. Equity Categories Present in the Reports

The following population groups are explicitly reached:

Equity Category	Examples in Reports
Racialized Communities / Black Communities	Dufferin County Canadian Black Association (2022–2025), DEI training
Indigenous Engagement	Cultural Resource Circle, land based education, recognition events
2SLGBTQIA+ Communities	Celebrate Your Awesome (recurring), Youth Activists Inc. (2024)
People with Disabilities / Neurodiverse Groups	Branching Out Supports (Horticultural program), Theatre Orangeville inclusive programs
Low-Income Households / Food-Insecure Residents	School nutrition programs, Good Food Project, congregate meals
Refugee / Newcomer Communities	First Line for Syria (2022), Multicultural Foundation (2023–2024)
Women & Gender-Focused Equity	PERIOD Ontario (2023), Women's shelter supports
Rural Residents	Many programs cite rural access issues in Shelburne, Mulmur, Grand Valley

Equity Category	Examples in Reports
Seniors	Meals on Wheels, Seniors Centre programs (all years)

B. HOW “EQUITABLE” IS THE DISTRIBUTION?

1. Spread Across Populations

The grants reach **at least 10 identifiable equity seeking groups**, including:

- Racialized residents
- Indigenous community members
- Refugees
- 2SLGBTQIA+ people
- Neurodiverse and disabled community members
- Low-income households
- Seniors
- Rural residents
- Youth at risk
- Women facing period poverty

Each year shows representation of **5–8 different groups**.

2. Geographic Equity

Reports show recurring inclusion of:

- Orangeville
- Shelburne
- Grand Valley
- Mulmur
- Mono
- Amaranth
- Rural/agricultural communities

3. Program Equity (Diversity of Sectors)

Funding is not concentrated in any one sector:

- Food security
- Mental health
- Arts & culture
- Youth supports
- DEI training and community empowerment
- Seniors services
- Recreation
- Environmental initiatives

All present every year, showing **sector-level breadth**.

4. Equity Gaps Identified

- **Climate & Environment** receives the fewest aligned programs annually (1–2 per year).
 - **Rural & remote access** receives attention but less funding proportionally compared to urban Orangeville-based programs.
 - **Indigenous-led programs** are present but still underrepresented (1–2 per year).
-

3. HIGH-LEVEL CONCLUSION

A. Sector Reach

Across 2022–2025, the grants program reaches a wide array of community sectors, with strongest representation in:

- Youth development
- Food security
- Arts & culture
- Mental health
- Seniors services
- DEI / multicultural supports

B. Equity Distribution

Across all four years:

- The program demonstrates strong multi-dimensional equity distribution, touching at least 10 priority populations.
- Equity is often addressed as a secondary benefit, even when not the primary alignment.
- Distribution is broad, multi-sectoral, and geographically inclusive.

Municipal Program Assessment: Human Rights Program

Department/Division: People & Equity Administration

Executive Summary

The Human Rights Function supports a safe, respectful, and legally compliant workplace by managing workplace discrimination and harassment complaints in accordance with the *Ontario Human Rights Code* and the *Occupational Health and Safety Act*. Delivered through an internal, centralized model within the People and Equity Department, the program provides intake, triage, investigation, case management, training, and policy support related to respectful workplace and human rights matters. The function was established following Council's approval of the Equity Strategic Plan and is informed by findings from the 2022 Equity Audit and subsequent staff engagement surveys.

Three options were considered in this review:

- **Option A – Maintain the Human Rights Function**
This option maintains the current in-house delivery model, with a dedicated Human Rights and Respect in the Workplace Investigator responsible for intake, investigations, early resolution, training, and legislative compliance.
Budget Savings: None
- **Option B – Eliminate the In-House Function and Outsource Investigations**
Under this option, the internal Human Rights position would be eliminated and investigations would be conducted by external third-party investigators as required. This approach is commonly used by many organizations and can provide independence and expertise, particularly in complex or senior-level cases.
Budget savings: \$138,200/year in staffing costs.
However, investigation costs would become variable and unpredictable, with third-party investigations typically ranging from \$20,000–\$30,000 per case, resulting in potential annual costs significantly exceeding current expenditures depending on volume.
- **Option C – Eliminate the Function and Distribute Investigations Internally**
This option would eliminate the dedicated Human Rights role and distribute investigation responsibilities to managers or Human Resources staff as an "off-the-side-of-the-desk" function.
Budget savings: \$138,200/year in staffing costs.
This option introduces operational, legal, and reputational risks associated with inconsistent investigative quality, delays in meeting legislative timelines, conflicts of interest, and reduced procedural fairness.

Department Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Human Rights Function

Department/Division: People and Equity

Legislative Mandate:

The following are the applicable legislation and supporting case laws:

Ontario Human Rights Code (“Code”)¹

- Section 5(1)
Every person has the right to equal treatment with respect to employment without discrimination based on protected grounds (e.g., race, gender, disability).
- Section 5(2)
Every person who is an employee has the right to freedom from harassment in the workplace by the employer or agent of the employer or by another employee, based on those same protected grounds.
- Section 9
Prohibits any person from directly or indirectly infringing on the rights guaranteed under Part I of the Code—including Sections 1, 2, 3, 5, and 6. This obliges employers not only to refrain from discriminatory or harassing behaviors but also to avoid enabling or indirectly supporting such conduct.
- Section 46.3(1)
An employer can be held vicariously liable for discriminatory conduct of its employees, even if the employer didn’t authorize or know of it. Though this specific provision refers to discrimination and not harassment, similar principles underline liability for failing to address harassment.

Occupational Health and Safety Act (“OHSA”)²

- Section 32.0.1
Employers must develop and maintain written policies on both workplace violence and harassment, reviewing them at least annually, and posting them visibly or making them available electronically.
- Section 32.0.7
An employer is required to develop and maintain a written program to implement a policy regarding respect to workplace harassment.
 - Employers must carry out an appropriate investigation, which is:
 - Completed promptly, typically within 90 days;
 - Objective and independent of the alleged harasser;

¹ *Human Rights Code*, R.S.O. 1990, c. H.19

² *Occupational Health and Safety Act*, RSO 1990, c O.1.

- Confidential, gathering evidence from all parties;
- Thorough, including interviews and documentation.
- Section 32.0.2
Mandates that all employers develop and maintain a formal workplace violence program to implement their workplace violence policy.
- Sections 32.0.2–32.0.6
 - assess and manage risks;
 - establish reporting procedures to alternate individuals if the supervisor or employer is involved;
 - maintain confidentiality;
 - communicate investigation outcomes and corrective actions to both complainant and respondent.
- Section 55.3
A Ministry of Labour inspectors may order an employer to conduct an investigation.

Case Law

- *Stride v. Syra Group et al*³

The Ontario Superior Court of Justice found that an employer’s failure to properly address and investigate workplace harassment and assault contributed to a wrongful dismissal finding. The Court awarded eight months’ notice of termination (including continued benefits), \$125,000 in damages for breaches under the OHSA, ESA, and Employment Standards Act, 2000, and \$50,000 in moral damages tied to emotional harm caused by bad faith and the failure to address harassment. The total exposure in that case was a direct function of the employer's failure to respond adequately.

Program Description: Brief summary of the program’s purpose, objectives, and target population.

The Human Rights Function promotes a safe, inclusive work environment by enforcing the County’s Harassment and Respectful Workplace Policy, the Ontario Human Rights Code (“Code”), the Occupational Health and Safety Act (“OHSA”), and relevant case law.

The function of the office is to serve as an internal resource for the County, and it originated as a result of Council approval of the outcomes identified in the Equity Strategy (2023) from the Equity Audit Data (2022) and the Staff Engagement Survey (2024).

The program addresses various work-related matters; however, the particular focus of the program is to address the following:

- a. Respond to workplace discrimination and harassment matters as per legislative requirement.
- b. Provide in-house consultation, case management and support to the County regarding workplace discrimination and harassment complaints, i.e.: whereby the program

³ *Stride v. Syra Group et al.*, 2024 ONSC 2169.

executes intake, investigation, risk management, mitigation and legislative required functions.

- c. The program delivers training, capacity building, Harassment and Respectful Workplace Policy updates and ad hoc needs to the County in relation to Human Rights, Respectful Workplace, Discrimination, Harassment, Bullying, Legislative Responsibilities and many more.
- d. The program accomplishes the Council approved needs of the County as identified in the Comprehensive Equity Strategy from the Equity Audit Data and the Staff Engagement Survey in relation to maintaining the ongoing need to address the gaps identified by staff for a safe and respectful workplace as per the internal policy, Ontario Human Rights Code (*Code*) and Occupational Health and Safety Act (*OHSA*).
- e. The capacity of the Program helps control as follows:
 - ***Intake and triage errors*** are among the most consequential. Misclassifying a Code issue as a routine interpersonal conflict, failing to spot reprisal risk at the outset, or missing interim safety needs can compound harm and create additional liability before a formal investigation even begins.
 - ***Independence and conflict management*** present a related challenge, particularly where the respondent is a senior leader, an HR professional, or someone close to decision-makers. These situations increase the risk of scrutiny under OHSA section 55.3 and may undermine the credibility of any finding.
 - ***Confidentiality and disclosure discipline*** are also areas of frequent failure. OHSA requires that disclosure of identifying information be limited to what is necessary for the investigation, corrective action, or legal compliance.
 - ***Procedural fairness and the overall quality of the investigation*** remain persistent risks, especially when investigations are conducted by individuals without training or experience. Good practice standards emphasize impartiality, clear scope, access to necessary evidence, and investigator competence. When these basics are missing, findings become vulnerable and workplace trust deteriorates.

Goals and Objectives:

The measurable goals and objectives of the Human Rights Function are as follows:

- **LEGISLATIVE REQUIREMENTS:** For the County to meet the legislative responsibility under the Ontario Human Rights Code (Code) and Occupational Health and Safety Act (OHSA) regarding Respect, Discrimination and Harassment in the workplace.
- **POLICY:** Update the Harassment and Respectful Workplace Policy by adhering to legislative updates as required under the Occupational Health and Safety Act (OHSA) and as identified through internal survey and external data.

- INVESTIGATE: Provide a fair, trauma-informed process in investigating complaints and allegations related to protected Human Rights and Respectful Workplace grounds under the legislation.

Strengths:

- The program satisfies the legislative requirement and strengthens the County’s defensibility to avoid scrutiny internally, publicly and under any governing institution. i.e.: Tribunal or Courts.
- The program provides early resolution options by offering alternative solutions to restore relationships amongst staff and the County in a non-adversarial and non-arbitrary manner.
- It strengthens the County’s position to attract talent and maintain public trust by demonstrating internal capacity to address conflicts, complaints, risk and control of the process.
- It reduces the burden of Senior Management Team and Supervisors to take on additional tasks.
- Our robust in-house Human Rights Program is an internal resource for the County to utilize as the central point for interim measures, investigations, policy review, training oversight and facilitation between staff, legal and union. In addition, it adheres to the legislative mandates and strengthens defensibility.
- Investigations are complex, and competency matters. Several recurring failure points in Ontario emphasize harassment and discrimination matters that translate directly into legal and organizational risk. An in-house Human Rights program upholds the integrity of the investigation process, by overseeing confidentiality, procedural fairness and potential attribution errors.

Weaknesses:

Our current Human Rights and Respect in the Workplace program can be improved by;

- Provision of more and varied human rights training and capacity building opportunities
- Enhanced electronic repository of human rights and respect in the workplace resources
- Increased promotion and awareness raising of the Human Rights function to the County

Current Delivery Method:

- The Human Rights Function currently operates as an internal resource to the County. The predominant function of the program is to facilitate duties in-house, however, occasionally the function will outsource or consult with external stakeholders. Under this architecture, the dedicated, in-house staff handles intake, triage, early resolution options, low-to-moderate complexity investigations, case management, and metrics.
- The program delivers various information sessions across the County. In addition, the program offers customized-based sessions for the County and will occasionally outsource some of the capacity building sessions.
- The program updates the Harassment and Respect in the Workplace Policy, as well as supports the County in various other policies and learning development.

2. Potential Changes

Describe areas under consideration

- If the County reduces or eliminates the Human Rights Function, the following models can be considered:

(a) Model 1: Distributed Investigations (Managers or Human Resources Staff Acting “Off the Side of the Desk”)

Distributing investigation responsibilities to managers appears cost-effective but poses substantial risks. Inconsistent quality hampers evidencing appropriate investigations as required by OHSA, especially without standardized training and oversight. Managers' stakes can compromise impartiality, leading to complainant disengagement. Less-experienced investigators risk reprisals and confidentiality breaches, creating liability. Additionally, investigations consume time, and delays elevate risks, particularly regarding interim safety measures for complainants. Furthermore, Manager will be taking on this added responsibility in addition to their daily task.

(b) Model 2: Outsourced External Investigator

Many organizations outsource investigations; thus, it would not be an unusual practice. Outsourcing offers independence and expertise, beneficial for senior leader allegations and complex issues. However, trade-offs include significant direct costs and unpredictable budgets, especially with multiple witnesses. External investigators may struggle to grasp organizational culture, impacting quality. Limited systemic learning occurs unless there's strong internal case management. Importantly, outsourcing does not relieve employers of statutory responsibilities; they maintain control over reporting and communication despite external fact-finding.

It is important to note many organizations outsource investigations; thus, it would not be an unusual practice. Municipalities such as the City of Toronto, Hamilton, London, Ottawa, Peel Region and in addition, many school boards have a Human Rights Office and also utilize external investigators as needed.

Providing services using an alternate delivery method

- Please refer to the models outlined above regarding the alternate service delivery methods.
- Implementing productivity enhancements through process redesign and/or technology
- Please refer to the models outlined above regarding productivity enhancements.
- Introducing additional sources of revenue (likely the most difficult): N/A

3. Key Performance Indicators (KPIs)

Current KPIs:

- Currently, the Office of Human Rights Function is tracking the number of complaints it receives, of which, it is divided into various categories to manage the case load. The data

below exhibits the results of the intake and investigation for 2024 and 2025:

- **Human Rights Function Internal Data for 2024**

- Reported Intake 7
- Reported Investigations 6
- Areas of Investigation:
 - 83% Bullying, Harassment and Discrimination
 - 17% Threat

- **Human Rights Function Internal Data for 2025**

- Reported Intake 28
- Reported Investigations 16
- Areas of Investigation:
 - 75% Bullying, Harassment and Discrimination
 - 19% Unprofessional Conduct
 - 6.25% Verbal Threat

- The program's two-year history shows growing awareness through socialization and training, leading to increased complaint reporting. This rise does not signify more discrimination or harassment but emphasizes the program's necessity in the County.

Impact on KPIs:

- Improvements to key indicators related to harassment and discrimination that is a result of the work that has been achieved by the County through the Equity Audit, Staff Engagement and the Human Rights Functions may regress and because if the Human Rights program is eliminated. Issues of psychological safety, harassment and discrimination in the workplace and our ability to respond to identified staff concerns by way of legal requirements will decrease.

Data Collection Methods:

- The method applied to collect the data was based on the tracking of intakes and investigations, which was driven from the data highlighted in the Equity Strategic Plan⁴.
- The Data was collected by surveys, interviews, focus groups and manual tracking of intakes and investigations.

Baseline Data:

- The data from the 2022 Equity Audit showed the percentage of staff who experienced Harassment and Discrimination was higher for those experiencing marginalization as follows:
 - Overall 35%
 - Black People 78%
 - Racialized People 44%
 - LGBTQ+ People 50%

⁴ Hansen, C., Marino, E., Kavcic, K., & Matshameko, G. (n.d.). (rep.). *Findings Report* (pp. 1–54). Feminuity 2022.

- Dufferin Oaks 39%
- With Accessibility Needs 45%
- Below is a comparison from 2022 to 2024 of the overall rates of staff that have experienced harassment and/or discrimination:
 - In 2022, the following percentage of staff directly experienced discrimination and harassment:
 - 26% Discrimination
 - 43% Harassment
 - In 2024, the following percentage of staff directly experienced discrimination and harassment:
 - 28 % Discrimination
 - 38% Harassment
- It is important to note that the County has noticed a slight decrease in staff reporting harassment in the County.

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs:

- The operating expense for the Human Rights Function is currently the salary of the dedicated in-house staff, whose role is to cover the personnel duties of the program by investigating complaints, facilitating information sessions, conducting intake, implementing an internal structure, creating reports, developing materials, drafting templates, overseeing the program, capacity building and adhering to any assigned duties.
- Human Rights & Respect in the Workplace Investigator, \$138,200

Operating Expenses: N/A

Contract Services:

- Only on an ad hoc or as needed basis.

Capital Expenditures: N/A

Projected Savings:

- The salary expense is the savings: \$138,200

Cost-Benefit Analysis:

- The cost saved to have an in-house program is significant, given that the cost of appointing an external investigator for each investigation can vary and be high.
 - In 2025 the County conducted approximately 28 Intakes of which 16 were investigations. A third-party investigator can be very costly, anywhere between \$20,000 to \$30,000 and in some instances, the costs can be much higher

- If the County were to merely investigate the 16 complaints in 2025 through an external investigator, it would cost the County approximately (16 x \$30,000) \$480,000, this excludes the number of intakes and depending on the nature of the investigation, it could cost higher.
- Low outsourcing benefit; in-house program enhances agility by monitoring legal developments effectively.
- In-house programs grasp internal culture, identifying gaps and aligning mitigation strategies with County structure.
- Reduces reputational harm through internal risk management and early gap mitigation.
- Investing in in-house allows clear escalation stages for complaints and systems that preserve control and investigation integrity, reducing risk and strengthening defensibility.

Support Costs:

- The Human Rights function collaborates with People and Equity staff and leadership and all staff across the County to investigate complaints, provide capacity building, identify trends in complaints and mitigate gaps. It also allows the leadership team to proactively be on top of resolution options if conflict were to arise.

5. Service Delivery Impact

Updated Service:

- Given that the program is driven by one dedicated staff, we cannot reduce the program and can only eliminate the staff. With that in mind, Model 1 and Model 2 are the only viable options as follows:
 - a) Model 1: Distributed Investigation: whereby the County distributes investigation responsibilities to other staff, such as managers or HR staff.
 - b) Model 2: Outsourced External Investigator: whereby, the County outsources to an independent third party.

Revised Goals and Objectives:

- The goals of the County’s Human Rights and Respect in the Workplace program does not change as previously stated, regardless of how the program is delivered.

New Service Delivery Model:

- The County can deliver service by either utilizing Model 1 or Model 2 as stated previously in this document.

Impact on Service Recipients:

- The County is at risk if staff are not adequately skilled to conduct workplace investigations, because issues related to procedural fairness and confidentiality that are required to be compliant with under OHSA and the County’s policy may be breached, which can result in reputable harm, liability and potential proceedings.

- Adding workplace investigation duties as an added duty to staff, may impact the turn-around time of an investigation, given that OHSA has an expected 90-days requirement. Therefore, any added task on staff portfolio can delay the investigation, which may impact on the County’s obligation.
- Delays can significantly impact any interim safety measures a complainant may require.
- If the program is outsourced, it will impact People Leaders, because the external investigator handles the investigation, but the County retains all the coordination pieces, which will be an added task on People Leaders.
- Staff of equity deserving groups, such as Black people, racialized women, LGBTQ+ people, and those with accessibility needs already face systemic discrimination, the loss of the program will disproportionately have a negative impact on those groups.
- The entire organization may be impacted if interim safety measures that are needed to protect a complainant are not provided in a timely manner, which can lead to negative publicity and legal risk.

Access and Equity Considerations:

- Yes, by reducing or eliminating this program it will likely have a significant impact on all equity deserving groups in the workplace, which will directly infringe on the employees guaranteed right to be free from discrimination as per *section 9 of the Ontario Human Rights Code*.
- Particularly because the data from the 2022 Equity Audit and 2024 staff Engagement Survey showed the percentage of staff who experienced Harassment and Discrimination was higher for equity deserving groups⁵.
- According to the 2022 Equity Audit 26% of people feared retaliation for reporting harassment and 33% for reporting discrimination⁶.

Quality Assurance Measures:

- If the program is eliminated or transition, the County would need to consider one of the following models to ensure responsibilities are met:
 - (a) Model 1 Distributed Investigation: Whereby the County distributes investigation responsibilities to other staff, such as managers or HR staff, who may feel close to the business.
 - (b) Model 2 Outsourced External Investigator: Whereby, the County outsources to an independent third party.
- Nevertheless, the County would need to maintain service quality by adhering to legislative requirements and efforts to address Respect, Bullying, Harassment and Discrimination in the workplace.

⁵ Feminuity 2023 -2027. (n.d.). (rep.). *Equity Strategic Plan* (pp. 1–23).

⁶ Feminuity 2023 -2027. (n.d.). (rep.). *Equity Strategic Plan* (pp. 1–23).

6. Impact Analysis

Alignment with Strategic Goals:

- The proposed changes does not support municipal priorities
- The goal of County's Corporate Strategic Plan is to ensure that the County is an inclusive, equitable and supportive Employer of Choice, the elimination of the Human Rights function lessens the County's ability to meet the stated objective.⁷
- One of the primary areas of focus of the Equity Strategic Plan "Greater Transparency for resolving and responding to Harassment and Discrimination". Elimination of the Human Rights function, does not put the County in alignment with this stated goal
- Eliminating the program undermines the County's responsibilities as per OHSA, Respect in the Workplace policy and the Code.
- The program originated as a result of Councils approval of the Equity Strategic Plan from the 2022 Equity Audit and 2024 Staff Engagement Survey, which particularly identified groups experience marginalization reported the highest rate of harassment and discrimination out of any group⁸.

Positive Impacts:

Model 1 to distribute investigation to County staff may benefit because:

- There is no additional cost associated.
- There is an opportunity to respond to complaints.
- There is knowledge of internal policies, work culture and procedures

Model 2 to outsource to an External Investigator may benefit because:

- It offers independence.
- It offers expertise.
- It reduces the County's workload on staff.

Negative Impacts:

- By implementing Models 1 or 2, the County may struggle to meet their legislative mandate as outlined in the first section of this document.
- The implementation of Models 1 or 2 may expose the County to reputational harm, legal implications and may negatively impact talent retention.
- Implementation of Model 1 or 2 may not be the most effective mode of delivery to meet the goals and objectives of the County's strategic plan and the Equity Strategic Plan or the requirements of the County's Harassment and Respect in the Workplace Policy.
- The absence of the in-house Human Rights Function may lead to negative impacts on psychological safety and reported harassment and discrimination.

7. Risk Assessment

Identified Risks:

⁷ Dufferin County Strategic Plan. (pp. 1-23)

⁸ Hansen, C., Marino, E., Kavcic, K., & Matshameko, G. (n.d.). (rep.). *Findings Report* (pp. 1-54). Feminuity 2022.

- Ontario’s occupational health and safety and human rights regimes impose positive legal duties on employers to prevent and address harassment and discrimination, and those duties implicitly require genuine capability: trained people, time, process discipline, and institutional credibility. An employer that has robust policies but lacks the infrastructure and resources to act on it is an employer that has not met its obligations.
- With the implementation of Model 1 there is a risk of overloading work and responsibility to People Leaders to lead investigation, which can lead to delays, mishandling of complaints, errors, impartiality issues which can result in lack of investigative procedural fairness.
- If Model 2 is implemented, there is a risk that costs could balloon.

Mitigation Strategies:

- Deliver comprehensive training for all staff in relation to Harassment and Respect in the Workplace Policy.
- Develop a operational structure for Workplace investigations for all People Leaders with an emphasis on procedural fairness, confidentiality, intake, interview techniques, thresholds assessments, findings and drafting of reports.
- A communication strategy would need to be developed to inform all County staff of the changes to the Human Right Function.
- Implement an increase to the budget for legal counsel to be on retainer for providing consultation or workplace investigations on an ad hoc basis.

8. Compliance and Regulatory Review

Regulatory Requirements:

The following are the applicable legislation for the County to comply with as explained in the legislative mandate section of this document as follows:

- Ontario Human Rights Code (“Code”)
- Occupational Health and Safety Act (“OHSA”)

Compliance Status: N/A

Legal Implications:

The elimination of the in-house Human Rights and Respect in the Workplace program may reduce the County’s ability to meet compliance under the OSHA and the CODE as follows:

(a) Occupational Health and Safety Act

Ontario's Occupational Health and Safety Act (OHSA) require employers to establish workplace harassment policies, programs, and train personnel for investigations. Reporting mechanisms are essential, especially if the harasser is a supervisor. Initiatives like Respect in the Workplace promote effective reporting. Recent updates expand definitions to cover virtual harassment, necessitating policy revisions and training. Section 55.3 enables

inspectors to enforce impartial investigations, underscoring internal investigation capabilities to manage regulatory risks effectively.

(b) Human Rights Code

The Ontario Human Rights Code identifies harassment and discrimination as rights-based harms, holding employers accountable for misconduct and inadequate responses. Employees deserve equal treatment and protection from reprisal. This introduces risk in organizational responses, necessitating human-rights literacy to ensure reliable investigations. The Ontario Human Rights Commission stresses organizational liability for both harassment and insufficient responses. Adequate resources for handling complaints are vital, as proper resourcing impacts legal risk management and the evaluation of employer actions.

9. Stakeholder Feedback

External/Community Input: N/A

Internal Feedback:

- The 2022 Equity Audit, the Equity Strategy Plan and 2024 Staff Engagement Survey.

10. Change Management

Change Management Strategy:

- If the Human Rights function is reduced or eliminated, there will be a need for our Harassment and Respect in the Workplace Policy to be reviewed to reflect those changes.
- With the implementation of either Model 1 or Model 2, an operational plan would need to be developed to ensure the roles and responsibilities are clearly identified regarding file retention, report writing, assignment of duties and distribution of tasks.
- All staff need to be provided with required training and support mechanisms be put in place.
- A comprehensive communications plan would need to be developed and implemented to inform all staff of the changes and the new direction.
- All current and future resources and materials regarding Human Rights needs to be developed and provided to staff that reflect the change of the program delivery model and to ensure there is a repository of Human Rights information people can access across the County in the absence of the existence centralized in-house program. Such as:
 - Intake, triage, threshold assessment and tracking of Complaints.
 - Conducting the investigation and producing findings report.
 - Developing and preparing drafts.
 - Creating trend analysis and identifying gaps to mitigate

Stakeholder Engagement Plan:

- Identity all stakeholders, all staff and all People Leaders, CUPE and ONA.

- The Stakeholders will be informed through Communication across the County.
- All stakeholders will have the opportunity to provide feedback through surveys, questioners and focus group interviews

Transition Plan:

- Complete an audit of all pending intakes and investigations to distribute open files accordingly.
- Distribute investigation responsibilities to other staff, such as managers, and ensure People Leaders are trained in the workplace investigation process.

Municipal Program Assessment: HRIS Implementation

Department/Division: People & Equity Department

Executive Summary

The Human Resource Information System (HRIS) Implementation Program supports the modernization of the County's people management functions through the deployment of UKG Pro, an integrated, enterprise-grade HRIS. Delivered in partnership by People and Equity, Information Technology, and Finance, the program centralizes employee data and automates core processes including recruitment, onboarding, payroll, time and attendance, benefits administration, and reporting. The system replaces fragmented legacy tools and manual processes, strengthens data governance and privacy controls, and enables employee and manager self-service across the organization.

Two options were considered in this review:

- **Option A – Eliminate the HRIS Program**

Under this option, the UKG Pro system would be discontinued with no immediate replacement. HR, payroll, and workforce management functions would revert to manual, decentralized, or legacy processes managed across departments.

Budget savings: approximately \$183,000, consisting of \$141,000 in UKG Pro licensing costs and \$42,000 in UKG Payroll costs.

However, this option would introduce significant operational, compliance, financial, and reputational risks, including increased payroll error risk, loss of audit trails and controls, greater staff workload, reduced data accuracy, and diminished employee self-service.

- **Option B – Maintain the HRIS Program**

This option maintains the current HRIS delivery model using UKG Pro as the County's centralized system of record for employee, payroll, and workforce data.

Budget savings: None.

Department Recommendation:

Proceed with Option B – Maintain the HRIS Program. While eliminating the HRIS would generate identifiable short-term cost savings, those savings are outweighed by the operational inefficiencies, staffing pressures, and compliance risks associated with reverting to manual and decentralized processes. The HRIS provides critical infrastructure that supports payroll accuracy, legislative compliance, internal controls, workforce analytics, and employee experience. Given the County's strategic priorities related to digital service modernization, financial stewardship, and being an inclusive and supportive Employer of Choice, maintaining the HRIS represents the most effective and fiscally responsible approach over the medium to long term.

1. Current Program Overview

Program Name: Human Resource Information System (HRIS) Implementation Program. (System: UKG PRO)

Department/Division: People & Equity in partnership with IT and Finance

Legislative Mandate: Supports compliance with Ontario employment legislation (Employment Standards Act & Ontario Health and Safety Act), Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), Personal Health Information Protection Act (PHIPA, for benefits/WSIB data), and record retention bylaws/policies.

Program Description: Implement a modern, integrated HRIS to centralize core P&E data and processes (recruitment, onboarding, employee records, benefits administration, performance, learning, and reporting/analytics). The program replaces fragmented legacy tools and spreadsheets, strengthens data governance, and enables self service- for staff and managers. Target population: all municipal employees, P&E staff, Finance staff, people leaders, and job applicants.

Goals and Objectives:

- Single Source of Truth: Consolidate employee and position data across P&E, Payroll, and Finance to reduce reconciliation and errors.
- Efficiency & Productivity: Automate manual processes (onboarding, changes, leave requests) and reduce cycle times for P&E transactions.
- Compliance & Risk Reduction: Standardize processes, improve audit trails, privacy/security controls, and legislative reporting.
- Employee/Manager Experience: Provide intuitive self service on web and mobile, improving service levels and satisfaction.
- Data Driven Decisions: Deliver dashboards and analytics for workforce planning, DEI tracking, and compensation.
- Strategic Alignment: Enable corporate digital strategy, service modernization, and fiscal stewardship.

Strengths:

- Executive sponsorship (P&E, IT, Finance) and cross functional steering committee.
- Clear business case with quantified pain points (duplicative data entry, lengthy onboarding, limited reporting).
- Phased roadmap to deliver value early (core HR + T&A first, then talent modules).
- Strong change management plan and stakeholder engagement.

Weaknesses:

- Competing priorities across departments may limit Subject Matter Expertise availability.
- Data quality issues in legacy systems require cleansing and mapping effort.
- Limited internal capacity for advanced analytics at go live.

Current Delivery Method: Project based- implementation with a vendor Software as a Service (SaaS) HRIS and a systems integrator; P&E and IT provide governance, data stewardship, and sustainment.

2. Potential Changes

Describe areas under consideration

- Cancel the implementation of the UKG HRIS platform

3. Key Performance Indicators (KPIs)

Current KPIs:

- Average time to- hire- (req approval to offer).
- New-hire onboarding cycle time (offer accepted to productive day 1).
- % data fields complete/accurate in core employee records.

Impact on KPIs:

- 25–40% reduction in time-to-hire via e-approvals and integrated posting/screening.
- 50–70% reduction in onboarding admin time with automated provisioning and e-forms.

Data Collection Methods:

- System logs and reports (HRIS analytics), payroll variance reports, audit trails.

Baseline Data:

2025: Average Time to Hire:

- Unionized External Recruitment - 58.19 days
- Non-Union - 45.15 days

Avg. New-hire onboarding cycle time (offer accepted to productive day 1) - 18.75 days

4. Budget and Financial Analysis

Current Budget Breakdown:

Operating Expenses

- \$141,000 UKG PRO Annual Cost
- \$42,000 UKG Payroll Annual Cost

Capital Expenditures: n/a

Projected Savings:

- Elimination of annual software licensing and maintenance fees
- Reduced reliance on a dedicated role
- Reduced staff time spent on system administration, troubleshooting, and vendor coordination

Cost-Benefit Analysis:

- Costs Saved

- Ongoing licensing, support, and subscription costs
- External vendor and consulting expenses
- Portion of staff time dedicated to HRIS administration and system support
- Benefits Lost
- Centralized and automated payroll, scheduling, and employee data management
- System-supported compliance with payroll, employment standards, and reporting requirements
- Operational efficiencies achieved through automation and system integration
- Data accuracy, audit trails, and reporting capabilities that support management decision-making

While financial savings would be realized by eliminating the program, the municipality would assume increased operational risk, manual workload, and potential compliance exposure if no alternative system or process is implemented.

Support Costs:

The UKG HRIS program requires ongoing interdepartmental support, including:

- Information Technology (IT): System integrations, security oversight, access management, and vendor coordination
- Finance: Payroll processing, financial reconciliation, and audit support
- Procurement: Contract management, renewals, and vendor negotiations
- Communications: Staff communications related to system changes, outages, training, or process updates

If the program were eliminated, these support demands would be reduced; however, alternative manual or replacement processes would likely shift workload rather than eliminate it entirely.

5. Service Delivery Impact

Updated Service:

- If the UKG HRIS program is eliminated, no replacement service is currently proposed under this option. The centralized HRIS platform supporting payroll, workforce management, and employee data management would no longer be in place.
- All functions previously supported by the system would either be discontinued or managed through manual, decentralized, or legacy processes on an interim basis.

Revised Goals and Objectives:

- Maintaining minimum payroll and employment obligations through alternate processes
- Continuing manual recruitment process through emailed applications and manual candidate tracking
- Ensuring continuity of pay and statutory compliance during transition
- Mitigating operational and compliance risks resulting from the absence of an HRIS
- Exploring future options for a replacement system or redesigned service model (if

approved)

New Service Delivery Model:

- Manual and decentralized processes managed by HR, Finance, and departmental staff

Impact on Service Recipients:

Internal Service Recipients:

- The primary service recipients are internal municipal employees, managers, and departments. Impacts include:
- Increased manual workload for HR, Payroll, Finance, and supervisory staff
- Reduced access to real time workforce, payroll, and scheduling information
- Potential delays or increased error risk in payroll processing and reporting
- Reduced self service functionality for employees (e.g., time entry, leave balances, pay information)

External Stakeholders

- Vendors or unions may be affected through slower reporting or issue resolution

Access and Equity Considerations:

Eliminating the HRIS may disproportionately affect:

- Employees with limited access to alternative reporting or communication methods
- Staff working variable shifts, part-time roles, or multiple assignments who rely on automated scheduling and timekeeping
- Employees requiring accommodation or accessible formats previously supported through standardized systems
- Decentralized processes increase the risk of inconsistent application of HR and payroll practices across departments, which may affect fairness and equity.

Quality Assurance Measures:

- Following elimination of the program, quality assurance would rely on:
 - Manual verification and reconciliation of payroll and HR data
 - Increased supervisory review and approval processes
 - Temporary controls to manage compliance risks and data accuracy
 - Documentation of interim processes to maintain continuity
- Despite these measures, service quality, consistency, and reliability would be more difficult to maintain without an integrated system. Any transition would require additional oversight and carry a heightened risk of service disruption.

6. Impact Analysis

Alignment with Strategic:

Goals:

- Advances digital government and service modernization priorities; supports financial sustainability through efficiency; improves employee experience and retention.

- The elimination of the HRIS program presents limited short term alignment with certain strategic objectives, while creating material misalignment with several core priorities identified in Dufferin County's Corporate Strategic Plan and Equity Strategic Plan.

Digital Government and Service Modernization

- Dufferin County's Corporate Strategic Plan identifies improving governance, service delivery, and advancing digital transformation as key objectives under the Governance priority area. Eliminating the HRIS would represent a shift away from digital enablement toward more manual and decentralized processes for HR and payroll administration.
- While elimination may temporarily reduce technology costs, it does not align with the County's stated commitment to innovation, continuous improvement, and modernization of internal services. Manual or legacy processes reduce standardization, data integrity, and system supported controls, which undermines digital government objectives and limits the County's ability to modernize internal operations in alignment with its strategic direction.

Financial Sustainability and Operational Efficiency

- From a short term financial perspective, elimination aligns partially with the Strategic Plan's emphasis on accountability and value for money, through immediate reductions in licensing, support, and vendor costs.
- However, the Corporate Strategic Plan also emphasizes efficient and effective service delivery and the need to strengthen internal capacity to meet growing organizational demands. Eliminating the HRIS introduces increased manual workload, process duplication, and additional oversight requirements, which may offset or erode financial savings over time. As such, elimination aligns with near term cost containment objectives but conflicts with longer term financial sustainability achieved through operational efficiency and system enabled controls.

Employee Experience, Retention, and Employer of Choice

- The Corporate Strategic Plan explicitly identifies the goal of ensuring the County is an inclusive, equitable, and supportive Employer of Choice, supported by the Equity Strategic Plan's focus on trust, belonging, wellness, and retention, particularly for employees from groups experiencing marginalization.
- Eliminating the HRIS may negatively impact employee experience by:
 - Reducing access to timely, accurate payroll and employment information
 - Increasing the risk of administrative errors and inconsistencies
 - Creating uneven application of HR processes across departments
- These impacts conflict with both strategies' stated objectives to improve workplace experience, engagement, and retention. The Equity Strategic Plan emphasizes that internal systems, policies, and practices must reduce barriers and support equitable outcomes; reliance on manual processes heightens the risk of inconsistent application and unintentional inequities.

Equity Lens and Data Informed Decision Making

- Both strategies commit the County to applying an equity lens across programs, services, and internal operations. The HRIS supports this objective by enabling standardized record-keeping, audit trails, and workforce data analysis that are foundational to identifying systemic barriers and monitoring equity outcomes.
- Elimination of the HRIS limits the County's ability to:
 - Consistently apply policies across the organization
 - Monitor workforce trends and equity related metrics
 - Support evidence-based decision making related to recruitment, retention, and employee experience
 - Establish a clear and defined recruitment and hiring framework that ensures diversity, equity, and inclusion. This is directly related to 2.1 of the Equity Strategic Plan, further referencing the implementation of an HRIS

As a result, elimination is misaligned with the Equity Strategic Plan's emphasis on accountability, transparency, and data supported equity action.

Positive Impacts:

- Immediate cost savings resulting from the elimination of software licensing, maintenance fees, and external vendor support.
- Reduced dependency on contracted services, which can simplify procurement and contract oversight in the short term.
- Short term staffing flexibility, as some system administration tasks would no longer be required.
- From a narrow financial lens, these impacts may be viewed as beneficial. However, research cautions that such savings are often offset by indirect costs when automation is removed, including increased manual effort and error correction

Negative Impacts:

Increased administrative burden and inefficiency

- Manual or fragmented payroll and HR processes require more staff time, increase duplication of effort, and divert resources away from higher-value work. Multiple studies show that payroll automation significantly reduces processing time and administrative workload while increasing accuracy.

Higher risk of payroll errors and compliance failures

- Payroll and HR functions are among the most control sensitive areas in public finance. Removing system-based controls increases the likelihood of errors, delayed payments, and noncompliance with employment legislation and collective agreements. Public sector governance frameworks emphasize robust internal controls as essential to financial accountability and risk mitigation.

Weakened internal controls and audit exposure

- Automated HRIS platforms support segregation of duties, authorization controls, audit trails, and data security. Research on payroll internal controls consistently finds that manual systems heighten exposure to fraud, unauthorized changes, and data integrity issues.

Negative employee experience and workforce impacts

- HRIS platforms provide employees with reliable, timely access to pay, leave, and employment information. Studies in municipal and public sector settings link HRIS use to improved employee satisfaction, trust, and retention. Eliminating the system may reduce transparency and confidence in payroll accuracy, particularly for employees with complex schedules or employment arrangements.

Reduced organizational resilience and scalability

- Research shows that municipalities relying on manual or outdated HR systems struggle to respond effectively to workforce changes, regulatory updates, and service delivery pressures. Digital HR systems are increasingly viewed as critical infrastructure rather than discretionary tools.

7. Risk Assessment

Identified Risks:

- Increased likelihood of payroll errors, overpayments, or underpayments due to manual processing
- Higher long term administrative costs resulting from increased staff time and duplicated effort
- Potential financial exposure associated with corrective payroll adjustments, retroactive payments, or penalties
- Operational Risks
- Reduced efficiency and reliability of HR and payroll processes
- Loss of system-based controls, workflow automation, and data integration
- Increased dependence on individual staff knowledge and informal processes
- Reduced ability to respond to staffing changes, reporting requirements, or regulatory updates
- Reputational Risks
- Reputational impact resulting from delayed or inaccurate employee pay
- Reduced employee confidence in payroll accuracy and employment administration
- Perceived regression in corporate services modernization and internal governance practices
- Compliance and Control Risks
- Increased risk of non-compliance with employment legislation, collective agreements, and internal policies
- Weakened audit trails, documentation, and reporting capability
- Greater exposure during external audits due to reliance on manual controls
- Workforce Risks

- Increased workload and stress on HR, Payroll, Finance, and departmental staff
- Potential impact on employee morale and retention
- Challenges in knowledge transfer, continuity, and succession planning

Mitigation Strategies:

- Development and documentation of standardized interim manual processes
- Increased supervisory oversight and approval requirements for payroll and HR transactions
- Additional reconciliation, verification, and audit procedures
- Temporary reallocation of staff resources to support manual processing
- Clear communication to employees regarding changes, expectations, and escalation procedures
- Exploration of interim or replacement solutions to reduce long term risk

8. Compliance and Regulatory Review

Regulatory Requirements:

- Employment standards legislation governing wages, hours of work, overtime, and leave
- Payroll tax and statutory deduction requirements
- Collective agreements and employment contracts
- Occupational health and safety and accessibility related employment provisions
- Municipal financial controls, records retention, and audit requirements
- Privacy and confidentiality obligations related to employee personal information

Compliance Status:

- Compliance would rely on manual controls and staff adherence to documented processes
- The risk of inconsistency and error would increase
- Additional internal review and oversight would be required to maintain compliance
- Audit readiness and reporting efficiency would be reduced

Legal Implications:

- Increased exposure to employment related claims or grievances arising from payroll errors or inconsistent application of terms and conditions
- Potential privacy risks associated with manual handling and storage of employee information
- Contractual obligations related to notice, termination, or wind-down of vendor agreements
- Increased risk during audits or investigations where documentation and system controls are limited

9. Stakeholder Feedback

Internal Feedback:

- Human Resources and Payroll: Concern regarding increased manual workload, error risk, and reduced internal controls if the HRIS is eliminated.
- Finance: Emphasis on the importance of system-based controls, audit trails, and payroll

accuracy to maintain financial compliance.

- Information Technology: Recognition that elimination would reduce system support requirements but increase operational risk and reliance on decentralized processes.
- Department Heads and Managers: Concerns regarding delayed access to workforce data, scheduling challenges, and reduced employee self-service functionality.

10. Change Management

Change Management Strategy:

- Clear and timely communication regarding the decision, rationale, and expected impacts
- Identification of affected roles, processes, and responsibilities
- Designation of accountable leads within HR, Finance, and IT
- Temporary stabilization measures to ensure payroll continuity and compliance during transition

Stakeholder Engagement Plan:

- Briefings for SMT and department heads outlining impacts and mitigation strategies
- Direct communication to affected staff regarding process changes, timelines, and support resources
- Targeted sessions with HR, Payroll, Finance, and IT staff to review revised workflows and responsibilities
- Ongoing updates and escalation pathways for issue resolution during transition

Transition Plan:

- Decision Confirmation and Governance
- Formal approval of program elimination
- Assignment of transition leads and accountability
- Operational Continuity Planning
- Documentation of interim payroll and HR processes
- Identification of manual controls and verification steps
- Data retention, access, and records management planning
- System Wind Down
- Notice and coordination with the vendor as per contractual terms
- Final data extraction and archiving
- Decommissioning of system access
- Staff Transition and Support
- Training and guidance for staff administering interim processes
- Additional oversight and quality assurance measures during initial transition period
- Post Transition Review
- Assessment of operational impacts, error rates, and staff workload
- Identification of longer-term options for replacement or redesign of HR and payroll services

Municipal Program Assessment: Staff Recognition Events

Department/Division: People & Equity Administration

Executive Summary

The Corporate Recognition Program supports employee engagement, morale, and organizational culture by formally acknowledging staff contributions through Long Service and Retiree Awards, the annual Staff Appreciation Event, and the CAICC Awards. Delivered directly by the People and Equity Department with collaboration across multiple divisions, the program reinforces the County's commitment to being an inclusive and equitable Employer of Choice and aligns with strategic priorities related to employee experience, belonging, and wellness.

Three options were considered in this review:

- **Option A – Eliminate All Staff Recognition Programs**
Under this option, the Long Service and Retiree Awards, Staff Appreciation Event, and CAICC Awards would be discontinued.
Budget savings: \$39,600 in operating costs, plus associated staff time.
- **Option B – Eliminate One Staff Recognition Program**
This option would retain two programs while discontinuing one, resulting in partial cost and staff time savings depending on which program is removed.
Budget savings: \$3,600 to \$18,000 in operating costs, plus 52 to 282 hours of staff time.
- **Option C – Maintain Staff Recognition Programs with Operational Efficiencies**
This option maintains all existing recognition programs while achieving savings through 5–7% operational efficiencies across the overall budget.
Budget savings: \$1,980 to \$2,772, with no reduction in programming.

Department Recommendation:

Proceed with Option C – Maintain Staff Recognition Programs with Operational Efficiencies. While eliminating recognition programs would generate higher short-term savings, the risks to employee engagement, morale, retention, and workplace culture outweigh the financial benefits. The Corporate Recognition Program contributes to measurable improvements in employee experience and supports strategic equity and organizational goals at a relatively modest cost. Maintaining the program while identifying targeted efficiencies elsewhere provides a balanced approach that preserves organizational health, minimizes risk, and maintains the County's commitment to valuing and recognizing its workforce.

Current Program Overview

Program Name: Corporate Recognition Program - Long Service and Retiree Awards, Staff

Appreciation Event, CAICC Awards

Department/Division: People and Equity Administration

Legislative Mandate: N/A

Program Description:

The County’s Corporate Recognition Program honours employee commitment and contributions through Long Service milestones, Retirement Recognition, and the CAICC Awards for outstanding performance, all supported by an annual Staff Appreciation Event that celebrates staff, strengthens engagement, and reinforces a positive workplace culture. While recognition programs have existed at the County for many years, they have undergone continuous improvements to ensure they remain inclusive and equitable, allowing staff from across different departments and service areas to participate and experience a meaningful sense of belonging and shared culture.

Goals and Objectives:

Equity is one of the County’s strategic priorities within the Strategic Plan 2023–2026, which commits to ensuring the County is an inclusive, equitable, and supportive Employer of Choice. The Equity Strategic Plan (2024–2027), developed through extensive staff consultation and engagement to support this broader strategic direction, identifies increasing feelings of trust, belonging, and wellness across the County of Dufferin as one of its four key priorities. The staff recognition program directly aligns with and supports this priority by providing meaningful opportunities to acknowledge employee contributions, celebrate milestones, and reinforce a culture in which individuals feel valued, included, and connected to the organization.

Strengths:

The Long Service and Retiree Awards have consistently maintained strong attendance and positive feedback, reflecting longstanding employee appreciation for this program. The Staff Appreciation Event has also experienced year-over-year growth in participation and has quickly become a signature County event that employees look forward to annually. Additionally, the CAICC Awards, launched in 2025, has already proven to be an effective way for staff to recognize one another in alignment with County values, fostering ongoing engagement and celebrating achievements on a monthly basis.

Weaknesses:

While the recognition programs are well received, several challenges limit their effectiveness. Communication and coordination issues, particularly obtaining timely RSVPs and accurate information from relevant stakeholders for Long Service and Retiree Awards, can affect planning, cause delays, and increase administrative effort. As a newer initiative, awareness of the CAICC Awards varies across departments, limiting participation in some areas. Additionally, delivering these programs requires coordination across multiple departments, creating capacity pressures and increasing complexity. Together, these factors can lead to uneven participation and reduce overall efficiency.

Current Delivery Method: Direct delivery

2. Potential Changes

Describe areas under consideration: The available options include eliminating all recognition programs, discontinuing one recognition program, or achieving 5–7% in operational efficiencies across the overall budget.

3. Key Performance Indicators (KPIs)

Current KPIs:

Human Resources Organizational Alignment Diagnostic - McLean & Company (2025)

- The Human Resources Organizational Alignment (HROA) Diagnostic is a tool that gathers crucial feedback to support the refresh or implementation of HR strategies and initiatives. It strengthens HR's ability to connect with and market its work across the organization, measure the impact of changes, and use analytics to demonstrate progress and guide informed decisions. Built on our HR Management & Governance Framework, the HROA Diagnostic helps identify the needs of organizational leaders, prioritize HR programs, and enable data-driven decision-making. This assessment encompassed the full scope of services delivered by the People and Equity Department.
- The Survey completed by County of Dufferin People Leaders with a 63% response rate, identified Employee Experience and Inclusion as the highest priority area in terms of importance, and the second highest in satisfaction based on current services.

Employee Engagement Report (2024)

- In 2022, 40% of staff surveyed reported that the organization's culture had a positive impact on their work. By 2024, that number had increased to 49%, indicating a notable improvement in how employees perceive the County's workplace culture.
- In 2022, 39% of staff surveyed felt that their manager recognized strong job performance. By 2024, that number had risen to 58%, reflecting a significant improvement in how employees perceive recognition from their managers.

Long Services and Retiree Awards Ceremony 2025 - Post Event Survey

- A rating of 4.75 out of 5 indicated that surveyed participants enjoyed the Long Service Award Ceremony, demonstrating a high level of overall satisfaction with the event.
- What people said when asked what they enjoyed about the ceremony:
 - "It was so inspiring to see people work for the company for so long."
 - "To celebrate those that have spent their lives shaping the County for better."

Staff Appreciation Event 2025 – Post Event Survey

- A rating of 4.65 out of 5 indicates that surveyed participants were fully satisfied with the overall quality of the event.

- 100% of participants surveyed indicated that they would recommend the event to a colleague.
- What Staff shared about the event:
 - "Thank you to the County and staff who planned, organized, and hosted this event. It was lovely."*
 - "The co-ordination and planning of this kind of afternoon cannot be easy. You did a wonderful job, including bringing in some nice weather & sunshine! This staff member 'Appreciates' you for doing what you did for all of us."*

Impact on KPIs:

Eliminating staff recognition programs would likely reduce employee engagement, weaken morale, and negatively affect several core KPIs. Without formal opportunities to acknowledge achievements and long service, employees may feel less valued, leading to lower engagement scores, reduced participation in organizational initiatives, and a decline in overall workplace satisfaction. Turnover could rise as well, impacting retention KPIs and increasing replacement costs. Productivity and performance metrics may decrease since recognition helps reinforce positive behaviors. Additionally, cultural indicators such as sense of belonging, pride in the organization, and connection among employees would likely deteriorate, along with manager-effectiveness and employer-brand metrics. Overall, removing recognition programs generally results in measurable declines across engagement, retention, performance, and culture-related KPIs.

Data Collection Methods: Surveys and Reports

Baseline Data:

County Strategic Plan, Equity Strategic Plan, Staff Engagement Survey, Human Resources Organizational Alignment Diagnostic Survey, Post Event Surveys

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs

- Staff time planning and executing events
- Long service awards require approximately 282 hours of staff time at an estimated value of \$20,100
- CAICC awards require approximately 52 hours of staff time at an estimated value \$4,100
- Staff appreciation events require approximately 184 hours of staff time at an estimated value \$8,500
- The cost calculation includes the core activities required to plan and deliver these events, such as meeting time, planning and coordination, day-of setup and takedown, event management, communications, material development, and vendor consultations. All resource and material development including invitations, the commemorative video,

printing, music, and the use of A/V equipment is completed entirely in-house, utilizing internal expertise and County resources. Together, these activities represent both the administrative effort and operational resources involved and reflect the collaborative work of multiple departments and divisions across the County.

Operating Costs:

- Budget for long service awards is \$18,000 including gifts provided to retirees and to employees celebrating milestone achievements of 10 years or more.
- Budget for staff appreciation events is \$18,000.
- Both budgets include catering and food vendors, professional photography, floral arrangements, and office supplies.
- Budget for CAICC awards is \$3,600.

Contract Services: N/A

Capital Expenditures: N/A

Projected Savings:

- The three options under consideration are to eliminate all recognition programs, eliminate one of the existing recognition programs, or achieve savings by identifying 5–7% in operational efficiencies within the overall budget.

Eliminate all recognition programs: \$39,600 in projected savings

Eliminate one of the three programs

- Long Service Awards: \$18,000 in projected savings, plus 282 hours of staff time
- Staff Appreciation Event: \$18,000 in projected savings, plus 184 hours of staff time
- CAICC Awards: \$3,600 in projected savings, plus 52 hours of staff time
- Find 5–7% in operational efficiencies from the overall budget:
 - 5% = \$1,980
 - 7% = \$2,772

Cost-Benefit Analysis:

A range of cost-saving approaches has been analyzed to balance fiscal responsibility with organizational impact. Eliminating all staff recognition programs would generate the highest annual savings, approximately \$39,600, but this must be weighed against the potential decline in employee engagement, morale, and workplace culture, which can affect retention, productivity, and overall satisfaction. Reducing recognition programming by discontinuing one initiative would result in more moderate savings, ranging from \$3,600 for the CAICC Awards to \$18,000 for either the Long Service Awards or the Staff Appreciation Event, while still maintaining some level of formal recognition. Alternatively, identifying 5–7% in operational efficiencies within the overall budget would yield estimated savings between \$1,980 and \$2,772, preserving employee recognition programs but requiring sustainable efficiency measures elsewhere. Each approach presents a trade-off between immediate financial savings and potential longer-term impacts on

organizational culture and performance.

Support Costs:

The People and Equity department covers all operating costs, while People & Equity, Dufferin Oaks, the Office of the CAO, Operations, Facilities, and Environmental Services incur in-kind costs through staff collaboration and participation.

5. Service Delivery Impact

Updated Service: N/A

Revised Goals and Objectives:

Goals and Objectives related to staff recognition, regardless of delivery model, does not change.

New Service Delivery Model:

The three options under consideration are to eliminate all recognition programs, eliminate one of the existing recognition programs, or achieve savings by identifying 5–7% in operational efficiencies within the overall budget.

Impact on Service Recipients:

Changes to staff recognition programming—whether through full elimination, partial reduction, or maintaining programs while pursuing operational efficiencies—would affect employees, People Leaders, and the broader organization in several meaningful ways. Staff recognition programs are known to support retention and engagement, and any reduction may have unintended consequences for workforce stability. Employees, particularly long-tenured staff, could experience a loss of formal acknowledgement for their contributions, potentially impacting morale, sense of appreciation, and connection to the workplace. People Leaders may have fewer structured tools to reinforce positive performance and foster engagement, making it more challenging to motivate teams and sustain a strong organizational culture. Departments involved in recognition activities would also experience reduced opportunities for cross-organizational collaboration. While cost savings may be realized under certain approaches, the related impacts on culture, engagement, retention, and employer brand should be carefully considered to ensure organizational health is maintained.

Access and Equity Considerations:

The reduction or elimination of staff recognition programs may disproportionately affect certain groups, particularly long-tenured employees, those in lower-visibility roles, and individuals whose contributions are not often recognized through other channels. These programs provide an equitable way to acknowledge service and achievement across all departments and job classifications. Removing them could reduce opportunities for inclusive recognition, weakening the sense of belonging for employees who rely on formal acknowledgement to feel their work is seen and valued. Those without frequent access to leadership or public-facing work may experience an even greater loss of visibility and

appreciation.

Quality Assurance Measures:

To ensure any changes to staff recognition programming are implemented effectively, quality assurance measures will focus on monitoring outcomes and identifying impacts over time. Employee feedback will be gathered through existing surveys and targeted pulse checks to assess changes in engagement, morale, and employee experience. Participation and attendance levels in recognition activities will be tracked and compared against previous years to identify shifts in interest or accessibility. Key indicators such as turnover trends, engagement scores, and qualitative feedback from employees and People Leaders will be reviewed to detect emerging issues and support timely adjustments where necessary.

Impact Analysis:

Although cost savings may be achieved through changes to the staff recognition program, these savings must be weighed against potential negative impacts on employee engagement, morale, and organizational culture.

Alignment with Strategic Goals: N/A

Positive Impacts: Cost Savings

Negative Impacts:

The reduction or elimination of staff recognition programs may lead to challenges such as decreased employee morale, reduced engagement levels, and a weakening of overall workplace culture. Formal recognition programs also provide consistency in how employees are acknowledged; without them, People Leaders would take on recognition individually, which could introduce inequities in how staff experience appreciation across the organization. Service levels may decline if motivation and discretionary effort diminish, and higher turnover could result in staffing gaps or increased recruitment demands. People Leaders may find it more difficult to maintain team cohesion without formal recognition tools, and the organization may face community or employee backlash if long-standing recognition traditions are discontinued.

7. Risk Assessment

Identified Risks:

Reducing or eliminating staff recognition programming may create a cascading effect, beginning with decreased morale and lower employee engagement, which can subsequently impact productivity and overall workplace culture. Diminished recognition opportunities may contribute to negative perceptions of the organization and informal criticism, reinforcing the view that employee contributions are undervalued. Over time, these impacts may increase turnover pressures, resulting in higher costs associated with recruitment, onboarding, and training, and placing additional strain on organizational capacity.

Mitigation Strategies:

To mitigate the potential impacts of reducing or eliminating staff recognition programs, the

organization could consider implementing low cost or no cost alternatives, such as informal peer to peer recognition, manager led appreciation practices, and digital or internal acknowledgements. Enhancing communication around employee achievements, reinforcing regular feedback, and supporting professional development opportunities may also help sustain engagement and morale. Ongoing monitoring of key performance indicators, including engagement and morale measures, turnover, and service quality, would support early identification of negative trends and allow for timely adjustments to maintain organizational effectiveness.

8. Compliance and Regulatory Review

Regulatory Requirements: N/A

Compliance Status: N/A

Legal Implications: N/A

9. Stakeholder Feedback

External/Community Input: N/A

Internal Feedback:

Internal feedback has been gathered through the Equity Audit, the Staff Engagement Survey, the Human Resources Organizational Diagnostic Assessment, and multiple Staff Post-Event Surveys.

10. Change Management

Change Management Strategy:

Any reduction or elimination of staff recognition programming will be supported through a structured change management approach that emphasizes transparency, clarity, and consistency. Key messages will clearly outline the rationale for the change, anticipated impacts, and the future direction, ensuring employees understand the context and intent behind the decision. Communication will be delivered through multiple channels, including email and SharePoint, to ensure broad and equitable reach across all departments, divisions, teams, and functions. Communication regarding the proposed changes will begin in 2026, with any revised approach taking effect in 2027. As part of the transition, the Corporate Recognition Policy will be reviewed and updated to reflect the approved direction and to provide clear guidance for People Leaders and staff.

Stakeholder Engagement Plan:

The stakeholder engagement plan will ensure that all affected groups are informed and appropriately engaged throughout any reduction or elimination of staff recognition programming. Key stakeholders, including employees, People Leaders, and union representatives, where applicable, will receive timely and consistent communication outlining the rationale for the change, anticipated impacts, and key implementation milestones. Engagement will be supported through

targeted SharePoint communications, leadership toolkits, and ongoing updates delivered through established internal channels. This approach is intended to ensure clear, consistent messaging and provide stakeholders with adequate awareness of the changes and their implications.

Transition Plan:

Following any reduction or elimination of staff recognition programming, departments will have the discretion to determine whether they wish to continue recognition activities within their teams. The People and Equity Department will support this transition by providing guidance, tools, and information to assist departments that choose to develop alternative or localized recognition approaches. Departments will be responsible for designing, implementing, and managing any recognition practices they elect to maintain, allowing for flexibility while supporting alignment with overall organizational expectations and values.

Municipal Program Assessment: Health & Safety Program

Department/Division: People & Equity

Executive Summary

The Health and Safety Program ensures the County's compliance with Ontario's *Occupational Health and Safety Act* (OHSA) by supporting a safe work environment through training, policy development, hazard identification, and active participation in the Internal Responsibility System. Delivered through a centralized internal model led by a dedicated Health and Safety Advisor, the program provides direct support to all County departments, Joint Health and Safety Committees, and two member municipalities (East Garafraxa and Melancthon). The program plays a critical role in managing legal risk, sustaining a strong safety culture, and demonstrating due diligence as required under provincial legislation.

Two options were considered in this review:

- **Option A – Eliminate the Internal Health and Safety Program and Outsource Services**

Under this option, the County would transition from an internally managed Health and Safety Program to a fully outsourced service delivery model provided by an external contractor.

Budget savings: None. Savings in staff and employee costs would be offset by the costs of a fully outsourced health and safety program which ranges from \$130,000 to \$160,000 annually, and this option introduces increased operational, legal, and reputational risks, including reduced internal oversight and challenges demonstrating due diligence under the OHSA.

- **Option B – Maintain the Internal Health and Safety Program**

This option retains the current internal delivery model, preserving dedicated in-house expertise, embedded operational knowledge, and direct oversight of health and safety responsibilities.

Budget savings: None

Recommendation:

Proceed with Option B – Maintain the Internal Health and Safety Program. While outsourcing may offer perceived short-term financial savings, these are offset by increased risk exposure, reduced responsiveness, and weakened alignment with the Internal Responsibility System required under the OHSA. Retaining the internal program supports strong governance, regulatory compliance, and a proactive safety culture, while enabling the County to demonstrate due diligence and maintain direct control over worker health and safety

outcomes. Given the non-delegable legal responsibilities placed on the employer, the benefits of maintaining internal capacity significantly outweigh the limited and uncertain savings associated with outsourcing.

1. Current Program Overview

Program Name: Health and Safety Program

Department/Division: Health and Safety

Legislative Mandate:

Occupational Health and Safety Act (OHSA).

- Under Ontario’s Occupational Health and Safety Act (OHSA), the legal responsibility for worker health and safety rests squarely with the employer. Section 25 of the OHSA assigns clear and non-delegable duties to employers, including the obligation to take every precaution reasonable in the circumstances for the protection of a worker, to provide information, instruction and supervision, and to ensure prescribed measures and procedures are carried out in the workplace.
- The Act does not permit the transfer of accountability to third parties. In practice, this means that even where a health and safety management function is outsourced, the municipality—and its senior leadership—remains fully responsible for outcomes, compliance failures, and enforcement consequences under the OHSA.

Program Description:

The Health and Safety Program helps to ensure a safe and compliant work environment by implementing systems and procedures that meet the requirements of Ontario’s *Occupational Health and Safety Act (OHSA)*. The program supports the Internal Responsibility System (IRS), ensuring employers, supervisors, and workers work together to identify workplace hazards, control risks, and address safety concerns. It provides training, develops policies, supports Joint Health and Safety Committees (JHSCs), and promotes safe work practices.

Goals and Objectives:

- Maintain compliance with the OHSA by establishing and enforcing measures and procedures that protect workers from hazards.
- Promote shared accountability among employers, supervisors, and employees for workplace health and safety.
- Provide training
- Support Joint Health and Safety Committee’s (JHSC)
- Provide health and safety support to two member municipalities (East Garafraxa and Melancthon)

Strengths:

- JHSC structures support engagement, inspection processes, and collaborative problem-solving

- Required/requested Health & Safety training is arranged to support safe and compliant work practices
- Positive feedback from member municipalities supported by the H&S program demonstrates strong service quality, responsiveness, and value-added support in meeting their workplace health and safety needs.

Weaknesses:

- Limited capacity for proactive initiatives due to workload pressures

Current Delivery Method:

- There is one dedicated Health & Safety Advisor who provides the primary H&S support for the entire County, and they also support two member municipalities with their health and safety needs.

2. Potential Changes

Describe areas under consideration

- Elimination of internal H&S program

3. Key Performance Indicators (KPIs)

Current KPIs:

- % of new employees with H&S training – 93%
- Total of 201 H&S Training programs conducted in 2025

Impact on KPIs:

- None

Data Collection Methods:

- Manual

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs: \$138,200

Operating Expenses: \$35,400

Net costs less revenues and transfer from WSIB Reserve Fund, \$94,500

Projected Savings:

- None. Savings in personnel and operating costs would be offset by expense for external service provider.

Cost-Benefit Analysis:

- Transitioning H&S services from an internal model to an external contractor may yield short term cost efficiencies through reduced staffing however these savings must be weighed

against potential long term risks including reduced responsiveness, and potential impacts to compliance culture and employee safety outcomes, which could result in increased liability, incident rates and reputational harm.

- Estimates for an external provider lead the County's H&S program ranges from \$130,000 to \$160,000 annually. The services provided generally fall in the categories of;
 - Retainer/Program Management
 - Safety Audits
 - Policy/Program updates
 - Training sessions (limited)
 - Specialized services (Testing, incident support, etc..)
- Although there may be potential cost savings by transitioning the County's internally run H&S program to being provided by an external vendor, there are some hidden costs that may appear. Some "Hidden Costs" related to transitioning to an external contractor;
 - Difficulty demonstrating due diligence to MOL if knowledge is fragmented
 - Municipalities without in-house H&S expertise often spend more on legal support after a serious incident than they saved by outsourcing
 - Will not see day-to-day work as it actually occurs
 - Often relies on documentation rather than lived operational context
 - No single internal "owner" of safety outcomes
 - Unbudgeted invoices during the worst possible moments
 - Risk that issues escalate before expert support is engaged
 - Greater chance of issues reaching MOL before being resolved internally

Support Costs:

- The H&S Advisor position is embedded across all County departments, providing support and assistance where and as needed. The position also supports the Multisite Joint Health and Safety Committee (non-union) and the Joint Health and Safety Committee (JHSC) at Dufferin Oaks.
- There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employees by People and Equity, Finance, IT and Procurement. As well as capital replacement of laptops, monitors, and cell phones where applicable, approximately \$1,000 per year.

5. Service Delivery Impact

Updated Service: None

Revised Goals and Objectives:

The goals and objectives of the H&S program do change if the mode of service provision moves to an external service provider. See stated goals and objectives above.

New Service Delivery Model:

Fully outsourced service delivered by a contracted H&S vendor.

Impact on Service Recipients:

- East Garafraxa and Melancthon – these municipalities will no longer receive Health & Safety support from the County’s internal H&S Advisor. Without this dedicated internal resource, service levels may decline, including slower response times, reduced onsite presence, and decreased access to tailored support that reflects their unique work environments and operational practices
- Joint Health and Safety Committees – the committees benefit from the internal Advisor’s consistent, hands-on support, including participation in meetings, inspections, hazard assessments, and collaborative problem solving. Outsourcing may reduce frequency and consistency of support and the depth of guidance received.
- All County Employees – Employees may feel less supported without the regular presence of an internal Advisor who is familiar, visible, and accessible across worksites. Reduced onsite interaction may negatively affect trust in the H&S system, negatively impact the H&S culture, and hinder timely resolution of concerns.

Access and Equity Considerations:

- Employees who require modified work arrangements, ergonomic assessments, frequent check-ins, or immediate on-site assistance may be disproportionately affected if the contractor’s availability is limited or scheduled rather than on demand.

Quality Assurance Measures:

- Service level agreements – defining expected timelines and quality benchmarks with external service provider
- Monitoring and internal audits – scheduled compliance audits, review of inspection reports and corrective actions, verification that required OHS measures and procedures are carried out

6. Impact Analysis

Alignment with Strategic Goals:

- No, the proposed change does not align with strategic plan goals.
 - Does not align with governance and accountability – outsourcing introduces distance between operations and H&S which weakens oversight

Positive Impacts:

- Potential cost savings and cost predictability (fixed annual cost for budgeting purposes)
- Increased capacity (additional resources available when needed)
- Neutral perspective (consultant brings objective analysis of workplace hazards, practices and compliance risks without internal bias or history).

Negative Impacts:

- Weakened Internal Responsibility System (IRS) – outsourcing creates distance between

those who plan work and supervise employees and the H&S system itself weakening the IRS, which is critical to preventing injuries and maintain compliance with OHSA.

- Loss of internal expertise and organizational knowledge – the internal Advisor understands County operations, work environments and risks – this knowledge cannot be replaced/replicated quickly by external providers
- Reduced proactive initiatives – outsourcing may worsen the capacity for proactive measures as the contractor is not embedded in the day-to-day of the organization and will be working off a contract-based model.
- Service gaps – outsourcing may create temporary periods where things are delayed or take longer to respond to as a contractor typically works under fixed service hours.
- Outsourcing may give employees the perception of reduced commitment to worker safety.

7. Risk Assessment

Identified Risks:

- Outsourcing H&S risks weakening the Internal Responsibility System (IRS) by distancing those responsible for work planning, supervision, and resource allocation from the health and safety system itself, contrary to the intent of the OHSA.
- Any incident following the outsourcing may be interpreted as a negative consequence of the change, attracting media attention and placing a focus on the County and Council.
- In the event of a serious incident, regulatory inspection, or prosecution, Ministry of Labour inspectors will assess whether the municipality exercised meaningful internal control over its health and safety program. Reliance on outsourced management does not mitigate enforcement exposure; rather, it may complicate the municipality's ability to demonstrate that reasonable precautions were actively implemented and monitored by those with authority to act.
- OHSA duties remain with the employer, even if services are outsourced. The County and senior leadership retain legal accountability for compliance, outcomes and any enforcement actions.

Mitigation Strategies:

- People Leaders maintain active internal oversight and continue to fulfill all OHSA related duties
- Refresher training on supervisor duties under the OHSA and internal responsibility system (IRS)
- Ensure that a comprehensive service agreement, with contingencies and considerations is in place with independent external service provider

8. Compliance and Regulatory Review

Regulatory Requirements:

- Ontario's Occupational Health and Safety Act (OHSA)

Compliance Status:

- A recent external audit completed by Public Services Health and Safety Association (PSHSA) provides the County with a benchmark of our present occupational health and safety management system (OHSMS) and outlines potential gaps in legislative requirements as well as improvement opportunities. The report details recommendations in 34 priority areas and highlights key actions to ensure an enhanced and effective health and safety program. A few of the recommendations provided in the report include:
- Increase Joint Health and Safety Committee (JHSC) worker visibility and access. Focus on simple, repeatable actions that make the committee “real” to staff, such as post and regularly refresh: member names/photos, how to contact, meeting dates, recent wins/closures (one-page summary), add a consistent “How to bring an issue to the JHSC” pathway (QR code/email/Teams form) and publicize it at all sites.
- Establish a formal Hazard Identification Process. Develop a concise document that defines routine and non-routine hazard identification, task-based analysis (JHA/JSA), inspection-based identification, worker-reported hazards and near misses, use of the hierarchy of controls.
- Implement a simple, organization-wide Risk Assessment Procedure. Create a short procedure that defines purpose & scope (what gets assessed and why), when to perform a risk assessment (triggers such as new tasks, changes, new equipment, incidents, high-hazard work), who performs it (roles, required involvement of workers/JHSC as applicable), how risk is evaluated and prioritized (risk matrix and criteria), how results are communicated and stored (availability to affected parties + record control).

Legal Implications:

- While external consultants may support compliance efforts, the Act does not permit the transfer of accountability to third parties. In practice, this means that even where a health and safety management function is outsourced, the municipality—and its senior leadership—remains fully responsible for outcomes, compliance failures, and enforcement consequences under the OHSA.
- During a serious incident or Ministry of Labour, Immigration, Training and Skills Development (MLITSD) inspection/prosecution, the County must prove it exercised meaningful internal oversight of the program (monitoring Service Level Agreements, verifying training, acting on hazards), not merely relied on the contractor.
- The OHSA will issue orders, tickets, or proceed with prosecution if the County’s measures, training, or supervision are deficient.
- In practice, municipalities without in-house H&S expertise often spend more on legal support after a serious incident than they saved by outsourcing.

9. Stakeholder Feedback

External/Community Input:

- Please see the attached report from Public Services Health and Safety Association (PSHSA)

which in conclusion states:

Retaining health and safety management as an internal municipal function:

- *Aligns directly with the non-delegable duties imposed on employers under Section 25 of the OHSA*
- *Strengthens the Internal Responsibility System, as intended by Ontario legislation and Ministry guidance*
- *Enhances operational effectiveness through institutional knowledge and competence*
- *Supports due diligence and reduces regulatory and governance risk*
- *Reinforces a positive and sustainable safety culture*

For these reasons, I strongly encourage the municipality to view internal health and safety management not as a cost centre, but as a core governance and risk-management function essential to fulfilling its statutory obligations and protecting its workforce.

Internal Feedback: N/A

10. Change Management

Change Management Strategy:

- A corporate communication plan would be developed and shared via email, intranet and staff meetings explaining the change and the reason for the change
- Targeted communication with People Leaders, JHSC's, member municipalities that utilize our internal H&S Advisor
- Drop-ins sessions so employees can ask questions and seek clarification

Stakeholder Engagement Plan:

- Senior Leadership
 - Consultations to review rationale and risks
 - Regular updates during procurement
- People Leaders
 - Communications outlining changes and reminders on their ongoing OHSA duties
- Joint Health and Safety Committees
 - Engagement sessions to review how the vendor will work with them and where responsibilities lie
- Employees
 - Intranet announcements, FAQ documents, drop-in sessions

Transition Plan:

Phase 1 — Planning & Preparation (CAO, P&E, Procurement)

- Finalize decision to outsource and approve transition timeline.
- Develop procurement documents and service specifications, including defined SLAs and compliance expectations.

Phase 2 — Vendor Selection (Procurement, Senior Leadership, P&E)

- Issue RFP and evaluate submissions.
- Conduct vendor interviews and reference checks.
- Finalize contract including scope, SLAs and reporting requirements.

Phase 3 — Internal Wind-Down (Current H&S Advisor, P&E)

- Share files, hazard assessments, JHSC documentation, training schedules, and pending investigations.
- Update internal processes, policies, and forms with new contact information.

Phase 4 — Vendor Onboarding (Vendor, P&E, Current H&S Advisor, People Leaders)

- Introduce vendor representatives to departments, and JHSC's
- Conduct site orientation tours with vendor.

Phase 5 — Go-Live (P&E, Vendor)

- Vendor assumes full operational responsibility.
- Continue weekly check-ins to monitor issues, feedback, and service demand.

Municipal Program Assessment: Leadership Development Series

Department/Division: People & Equity

Executive Summary

The Leadership Development Series supports the effectiveness and capability of the County's leadership team by providing targeted, externally facilitated learning opportunities focused on core leadership competencies such as people leadership, communication, conflict management, and leading change. Delivered through two to three in-person workshops or keynotes annually—typically as part of Manager Town Halls, the series strengthens leadership confidence, builds cohesion, and supports a positive and inclusive workplace culture aligned with the County's Corporate Strategic Plan and Equity Strategic Plan.

Three options were considered in this review:

- **Option A – Maintain the Leadership Development Series**

This option maintains the current structure of the Leadership Development Series, with two to three externally facilitated, in-person sessions delivered annually by subject matter experts.

Budget savings: None

- **Option B – Reduce the Leadership Development Series**

Under this option, the series would be scaled back to one externally facilitated session per year, supplemented by internally developed resources and self-directed learning.

Budget savings: \$6,000

- **Option C – Eliminate the Leadership Development Series**

This option would discontinue all externally facilitated leadership development sessions, relying solely on internal resources and self-directed learning to support leadership development.

Budget savings: approximately \$12,000 in operating costs, plus reduced staff time associated with planning and coordination.

Department Recommendation:

Proceed with Option A – Maintain the Leadership Development Series as currently structured. While reduction or elimination of the series would result in modest cost savings, maintaining the full program provides greater long-term value by strengthening leadership effectiveness, supporting employee engagement and retention, and advancing strategic objectives related to equity, inclusion, and organizational performance. Feedback from participants demonstrates that externally facilitated, in-person leadership development is highly valued and contributes to

recent improvements in leadership behaviours. Given the relatively low cost of the program and its strong alignment with the County's Leadership Strategy and Employer of Choice goals, the benefits of maintaining the current structure outweigh the limited financial savings that would be achieved through scaling back or eliminating the program.

1. Current Program Overview

Program Name: Leadership Development Series

Department/Division: Learning & Organizational Development, People & Equity

Legislative Mandate: Not applicable

Program Description:

- The Leadership Development Series offers two to three workshops or keynotes to the leadership team throughout the year.
- These 2- to 3-hour workshops are open to all leaders and are typically facilitated in-person during a planned Manager Town Hall.
- Topics are currently chosen based on leadership needs and suggested topics of interest from the leadership team. Two sessions were delivered in 2025: "Communication Fundamentals for Leaders" and Conflict Management & Transformation". Future topics in the series will be chosen to align with the Leadership Strategy and build capacity in the recently identified leadership competencies, which are outlined below.
 - People leadership
 - Courageous communication
 - Strategic resourcing
 - Empowering change

Goals and Objectives:

- The learning series is designed to strengthen the capabilities, confidence, and cohesion of our leadership team. The sessions provide practical tools and strategies for navigating organizational challenges and supporting their teams.
- The initiative is aligned with our Corporate Strategic Plan, Equity goal #2 "Ensure that the County is an inclusive, equitable and supportive Employer of Choice." More specifically, the Series supports "staff well-being, development and engagement."
- It also supports the Equity Strategic Plan Goal #3, "Create clear guidelines and expectations for management relating to inclusive leadership, recognition, and psychological safety."
- The Leadership Series is important to the Learning & Organizational Development Strategy and our Leadership Strategy, as it will be a core component of the Leadership Development Program currently being planned to support the Leadership Strategy.

Strengths:

- The workshops are facilitated by external subject matter experts who bring their industry expertise, real-world experiences and perspectives on the relevant topics.

- Both workshops delivered during 2025 were well received and participants shared strong positive feedback.
- The in-person delivery format allows for greater collaboration, discussion, engagement and peer learning.

Weaknesses:

- Series topics and choice of facilitators are often limited based on funding constraints.
- Planning and coordinating each session can be time- and labour-intensive, straining limited internal resources.

Current Delivery Method:

- Sessions are facilitated in person by external partners contracted to provide training.

2. Potential Changes

The following options may be considered for scaling back the series to reduce costs:

- **Option 1:** Reduce the number of sessions offered per year. Based on 2025 where we had two sessions, sessions can be reduced from two to one.
- **Option 2:** Eliminate the series entirely. Only internal initiatives and resources will be offered to support leadership development.

3. Key Performance Indicators (KPIs)

Current KPIs:

- Improve overall leader effectiveness scores related to key areas such as communication, staff development, recognition, trust.

Impact on KPIs:

- Reducing or eliminating this series will have a direct impact on overall leader effectiveness. Without structured and consistent learning and skill-building opportunities, leaders often experience declines in key capabilities, including coaching, communication, decision making, and team engagement. Over time, this leads to lower psychological safety, inconsistent talent development, and performance management, resulting in an increased turnover risk. Sustained leadership development, supported through this learning series, helps ensure leaders have the tools to meet organizational expectations. A reduction or elimination can impact leaders' confidence and behaviours, in turn leading to performance gaps, less resilient teams, and an overall decrease in organizational effectiveness.

Data Collection Methods:

- Employee engagement surveys, post training surveys.

Baseline Data:

- Leadership effectiveness scores, 2024 Employee Engagement Survey:
 - Communication – 44% feel communication with leaders is good.
 - Staff development – 54% feel supported in career growth.

- Recognition – 58% feel leader recognizes strong performance.
- Trust – 37% feel communication is open and honest.

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs

- An estimated 5% of staff time is spent on work directly related to this program, \$6,900.

Operating Expenses

- Program cost about \$12,000.

Contract Services

- No.

Capital Expenditures

- Not applicable.

Projected Savings:

- Estimated financial impact: \$12,000.

Cost-Benefit Analysis:

- Benefits include reduction in expenses, staff time to coordinate training sessions, leaders have time back for operational tasks.
- Costs include:
 - Higher risk of costly performance issues due to leaders' weak people management and overall leadership skills.
 - Turnover risk for leaders and other employees looking for development opportunities.
 - Reduced innovation and strategic thinking without the benefit of external perspectives.
 - Diminished internal leadership capacity. Increasing reliance on external hires for leadership positions.

Support Costs:

- Support may be required from Procurement to review the vendor service agreements. Finance is required to process payment. The Office of the CAO (Executive Assistant) supports communication and logistics as part of regular planning for Manager Townhall sessions.

5. Service Delivery Impact

Updated Service:

- Only one externally facilitated session will be offered each year to support leadership development. Other resources and training, primarily e-learning, will continue to be available to leaders.

Revised Goals and Objectives:

- Without these sessions, leadership development priorities in progress or planned would be significantly scaled back to align with limited internal capacity and resources.

New Service Delivery Model:

- For option 1: One externally facilitated session per year. Sessions will be supplemented by internally developed resources and curated self-directed training.
- For option 2: Zero externally facilitated sessions. All training offerings will be developed and delivered internally. Based on current resources and staff capacity, offerings will be largely virtual, self-directed learning.

Impact on Service Recipients:

- Leadership development is a priority to improve leadership effectiveness. Without the leadership development series of sessions, the leadership effectiveness score will likely decrease over time, or at best remain stagnant. Leader effectiveness and engagement directly impact staff engagement and retention, so we could see negative impacts in both areas.
- Leaders will have limited learning opportunities available to them. The team has indicated that their preference for these scheduled in-person meetings is to use them for learning and development, which will be impacted by scaling back or eliminating these sessions.
- Developing leaders or new leaders will be losing the opportunity to learn alongside their more experienced colleagues.
- The feedback we receive consistently indicates that leaders appreciate the expertise shared during these sessions. Sessions developed and facilitated internally may not carry the same level of credibility or be valued in the same way as an external facilitator with subject matter expertise and broader perspective.

Access and Equity Considerations:

- Our goal to provide more opportunities for leadership development is linked to equity objectives in our Corporate Strategic Plan and Equity Strategic Plan. Rolling back this series will impact our progress towards achieving those objectives.
- Providing multiple learning delivery modes allows us to meet varying learning needs and accessibility requirements. Learner preference is an important consideration to ensure learning outcomes meet expectations. This approach also supports equity and efficacy in learning delivery.
- Learners in this group have expressed a preference for in-person, interactive training experiences. In a 2024 Learning Engagement survey, more than half of respondents chose "In-person at a Dufferin County site" as their preferred learning mode. Learners who indicated this preference will be less engaged with e-learning or other self-paced learning options.

Quality Assurance Measures:

- People & Equity will continue to ensure learning partners engaged to support the training series align with our values and that all facilitated sessions are high-quality and appropriate

to our needs.

- Internal resources will be redirected to supplement or support leadership development needs.

6. Impact Analysis

Alignment with Strategic Goals:

- This service supports several strategic goals, including the County's Corporate Strategic Plan, Equity goal #2 "ensure that the County is an inclusive, equitable and supportive Employer of Choice." Also, Equity Strategic Plan, Goal 1.3 "create clear guidelines and expectations for management."
- Neither of the revised options (reduction or elimination) serve the corporate goals. While we will be saving money, we will not be realizing any efficiencies or tangible benefits.

Positive Impacts:

- Cost savings of \$10,000 per year.

Negative Impacts:

- Risk of turnover – ensuring leaders are supported with development opportunities is an investment in staff. A Gallup 2025 survey indicated that an average of 31% of workers are engaged at work. Data consistently points to worker retention being closely linked to their direct managers. According to a 2025 Korn Ferry report, 80% of workers say they would stay in a job because they have a manager they trust. Supporting leaders' development helps ensure staff retention and engagement.
- Limited training options – While we will have other training options for leaders, these will be mainly static, self-directed format (e.g., e-learning, videos, electronic resources). Live training (in-person or virtual) allows for greater engagement and collaboration and is a preferred method for many learners.
- Weakened Leadership Strategy – as we finalize a Leadership Strategy that centres leadership development, this series will be an important component of ensuring leaders have rich and relevant learning opportunities from knowledgeable training providers. According to McLean & Co HR Trends Report 2026, most organizations identified leadership development as their number one priority. Our approach aligns with best practices and leading industry standards.
- Strained internal capacity: Developing and delivering similar training internally would require considerable resources. Realigning resources to support more internal training of this kind would negatively impact our capacity to complete work on other strategic priorities.

7. Risk Assessment

Identified Risks:

- Perception of value: In addition to providing learning content, these sessions convey to

leaders that we value their development enough to invest resources. Reducing or eliminating this investment risks sending a negative message regarding leaders' perceived value.

- Narrowed lenses or perspectives: Losing the external lens for these facilitated sessions may impact the diversity and range of perspectives leaders are exposed to and be able to apply in approaching topics.
- Reversal of recent gains: Our 2024 Employee Engagement survey provided several indicators of positive progress related to leadership behaviour and effectiveness. This progress can in part be attributed to leadership development activities and training efforts targeting specific leadership behaviours including inclusion, communication, and recognition. Maintaining these improvements will require a long-term commitment, as behaviours can regress over time in an environment that is demanding and constantly changing. The following examples provide a snapshot of the progress recorded in the survey.
 - 58% of employees reported that their leader recognizes strong performance, a 19% increase from 2018.
 - 44% of employees reported good communication between employees and leaders, an 11% improvement from 2018.

Mitigation Strategies:

- Increasing efforts to direct leaders towards other training offerings may marginally mitigate these risks.

8. Compliance and Regulatory Review

Regulatory Requirements: Not applicable

Compliance Status: Not applicable

Legal Implications: Not applicable

9. Stakeholder Feedback

External/Community Input: Not applicable

Internal Feedback: Feedback from participants in the two sessions hosted in 2025 is included below.

Communication Essentials:

- 94% of survey respondents rated the session Excellent or Very good.
- *"Andrea was an amazing speaker and the content extremely useful. I really enjoyed the session!"*
- *"The facilitator was so engaging and funny. I appreciated her style of delivery. Thank you so much for arranging this learning opportunity."*

Conflict Management:

- 100% of survey respondents rated the session Excellent or Very good.
- *"This session was great! Since their workshops we are introducing parts of this conflict strategy into our training with staff. We are using in training what a welcoming community looks like and non welcoming community, we are using the brag and drag and we are looking into our 2026 training to start incorporating intent, impact, emotions, contributions etc. This session was so valuable and finding that commonality of connection to start a conversation. Barry and Sara are great presenters would love to see them again."*
- *"The facilitators were clearly very knowledgeable on the topics and very thoughtfully answered questions and provided provoking questions that could be implemented right away. What I found to be most helpful was when we were able to work through scenarios in smaller groups to apply theories/best practices and also just talk about real life experiences or examples. More of that would have been even better!"*
- *"I really enjoyed the format and the content of these sessions."*
- *"You've given me tools to use now and in the future."*
- *"This has been an excellent training, we have started to add pieces of this into our department."*

10. Change Management

Change Management Strategy:

- We will communicate the change to the team via typical communication channels, including email and in-person leadership meetings.

Stakeholder Engagement Plan:

- We will continue to get feedback from leaders about their learning needs and endeavour to meet those needs with alternate resources.

Transition Plan:

- Not applicable.

Municipal Program Assessment: Equity Programming

Department/Division: People & Equity

Executive Summary

The Equity Strategic Plan is the County of Dufferin's first comprehensive, multi-year framework for advancing inclusion, diversity, equity, and accessibility across the organization. Delivered through the Equity Division within the People and Equity Department, the program supports legislative responsibilities under the *Ontario Human Rights Code* and the *Accessibility for Ontarians with Disabilities Act (AODA)*, while also advancing the County's Corporate Strategic Plan objective of being an inclusive, equitable, and supportive Employer of Choice. Since implementation, the program has contributed to measurable improvements in staff engagement, inclusion, belonging, and workplace culture.

Three options were considered in this review:

- **Option A – Eliminate the Equity Strategic Plan and Equity Division**

Under this option, the Equity Strategic Plan and centralized equity function would be eliminated, with responsibility for equity-related work decentralized across departments. Budget savings: approximately \$396,100/year, including staff positions and operating budgets.

This option presents significant risks related to legislative compliance, reputational harm, increased exposure to human rights complaints, erosion of workplace culture, and loss of accountability for systemic equity work.

- **Option B – Reduce Equity Programming and Services**

This option maintains the Equity Strategic Plan but reduces delivery capacity through continued vacancy or elimination of the Equity Advisor role, resulting in slower implementation of planned initiatives.

Budget savings: approximately \$125,000/year.

While preserving alignment with strategic and legislative obligations, this option slows progress, reduces organizational support, and increases pressure on other departments to assume equity responsibilities without centralized coordination.

- **Option C – Maintain the Equity Strategic Plan and Current Equity Programming**

This option maintains the current equity framework, staffing structure, and programming model to continue implementation of the Equity Strategic Plan as approved by Council.

Budget savings: None

Department Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Equity Strategic Plan

Department/Division: Equity Division, People and Equity Department

Legislative Mandate:

The Equity function is not a legislative mandate. However, the Equity function is responsible for supporting and/or leading legislative requirements under the Accessibility for Ontarians with Disabilities Act (AODA), 2005, and the Ontario Human Rights Code (the *Code*) (i.e. Multi-Year Accessibility Plan, Accommodation policies).

Program Description:

The Equity Strategic Plan is the County of Dufferin’s first-ever Equity Strategic Plan, a four-year plan that focuses on developing responsive solutions to current systemic challenges, workplace experiences, and emerging opportunities identified by an Equity Audit completed at the County in November 2022.

The Equity Strategic Plan consists of four Areas of Focus to be completed across a four-year timeline. Each goal has corresponding strategies that will be used to highlight how the County will work to achieve them and tactical actions that will be taken to reach the County’s desired outcomes.

The Equity Strategic Plan also is in alignment with the County’s Corporate Strategic Plan as it is one of the five priority areas identified with the plan. An objective of the Corporate Strategic Plan is for the County to be “An inclusive, equitable and supportive employer of choice.”

Goals and Objectives:

Goals from the Equity Strategic Plan are:¹

1. Increased feelings of trust, belonging, and wellness at the County of Dufferin, specifically for Black people, racialized women, LGBTQ+ people, caregivers, Dufferin Oaks, and those with accessibility needs
2. Stronger succession and recruitment pipelines to ensure groups experiencing marginalization have equitable access to career growth and management positions.
3. Greater levels of accountability and transparency for resolving and responding to instances of harassment and discrimination.
4. Empower individual accountability for EDI change through learning and community dialogue.
5. Dufferin County is a community for everyone. As we grow and evolve, we will work to ensure that our programs, services, and resources are responsive to the needs of

¹ Equity Strategic Plan 2024-2027, Dufferin County

community and reduce barriers to access. As an administration, we will lead by example and are committed to fostering a workplace culture that embodies the values of inclusion, diversity, equity, and accessibility.²

Strengths:

- Revised and developed a host of HR policies that uphold our legislative responsibilities under the Ontario Human Rights Code to ensure that harassment and discrimination is addressed appropriately
- Provided an ample amount of EDI learning opportunities for staff to increase their capacity to understand, engage in conversation and provide services to the public to support more inclusive service delivery
- Our EDI program has strong monitoring and evaluation framework to ensure accountability and transparency. We also receive regular input on the effectiveness of our programming and it allows us to make the needed adjustments when required

Weaknesses:

- Continuing to implement the Equity Strategic Plan in an ever-changing social political environment
- Like all programs and services, there is a need for additional resources
- Embedding equity processes within all County practices and decentralizing the responsibility of “equity” across the organization so that all areas take an active role in implementing equity

Current Delivery Method:

- Direct delivery, partnership and contract out

2. Potential Changes

Areas under consideration

- Reducing Equity services/programs; or
- Eliminating the Equity division/Equity Strategic Plan.

3. Key Performance Indicators (KPIs)

Current KPIs:

- Completion of 23 identified tactics in the Equity Strategic Plan
- Completed all of the Equity goals under the Corporate Strategic Plan

Staff Engagement Survey Overall Results (2024) Comparison to 2022 Equity Audit results:³

- +11% Represents a diverse group of people
- +13% People of all backgrounds have equitable advancement opportunities
- +12% Job performance is evaluated fairly

² Corporate Strategic Plan 2023-2026, Dufferin County

³ Employee Engagement Report November 2024, Dufferin County

- +9% Feel comfortable sharing opinions without fear
- +9% Belief that culture of the organization has a positive impact on work

KPI's from Staff Engagement Survey: Dufferin Oaks Results

- +15% People of all backgrounds have equitable advancement opportunities
- +15% Feel comfortable sharing opinions without fear
- +15% Job performance is evaluated fairly
- +14% That work enables me to have work and life balance
- +15% Belief that culture of the organization has a positive impact on work
- 47% decrease in terminations from 2023 to 2024 at Dufferin Oaks

Employee Turnover Data (2023 to 2024)⁴

Employee Turnover - Involuntary	2023	2024
Involuntary Non-Union (terminations)	1.65%	2.68%
Involuntary Union (terminations)	6.44%	4.55%
Total Involuntary Turnover	4.26%	3.69%

Human Resources (People & Equity) Organizational Alignment Diagnostic

A Human Resources (People and Equity) Organizational Alignment Diagnostic was conducted in December 2025 to gather feedback from People Leaders across the organization on People & Equity functions. This information will be used to improve satisfaction, better meet the needs of People Leaders, and further organizational goals and priorities. Survey respondents were required to rate the level of importance and their level of satisfaction as it relates to nine function areas within the McLean & Co HR Management & Governance Framework. The nine function areas are:

1. Organizational Effectiveness
2. Employee Experience & Inclusion
3. Talent Management
4. Talent Acquisition
5. Learning and Development
6. HR Technology and Analytics
7. Core Services
8. Auxiliary Services
9. Total Rewards

With a 63% response rate, across departments overall, respondents ranked Employee Experience

⁴ Human Resources Activity Report 2023-2024, Dufferin County

& Inclusion as the highest function of importance (first out of 9 positions) and second in satisfaction.⁵ Subfunctions within the Employee Experience and Inclusion function include:

- Culture;
- Employee Engagement Strategy;
- Inclusion and Belonging; and
- Health and Wellbeing.

Impact on KPIs:

- Reduction of the Equity function at the County would likely result in a reversal in the progress to date of our KPI metrics
- Elimination of the Equity function at the County would likely result in a reversal of the progress made to date trend of our KPI metrics
- Potential increased exposure to the County of not meeting its legislative requirements (OHRC, AODA, OHSA, etc.)
- Potential reputational risk and potential financial implications
- Potential reduced staff engagement scores

Data Collection Methods:

Baseline Data:

KPI's from Equity Audit Survey Overall Results (2022):⁶

- 62% Represents a diverse group of people
- 46% People of all backgrounds have equitable advancement opportunities
- 49% Job performance is evaluated fairly
- 42% Feel comfortable sharing opinions without fear
- 40% Belief that culture of the organization has a positive impact on work

KPI's from Equity Audit Survey: Dufferin Oaks Results

- 42% People of all backgrounds have equitable advancement opportunities
- 32% Feel comfortable sharing opinions without fear
- 40% Job performance is evaluated fairly
- 34% That work enables me to have work and life balance
- 29% Belief that culture of the organization has a positive impact on work

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs

- Equity Advisor and Equity Manager, \$277,100

Operating Expenses

- Consulting Fees \$20,000

⁵ Human Resources Organizational Alignment Diagnostic December 2025, McLean & Co.

⁶ 2022 Equity Audit Findings Report November 2022, Feminuity

- Corporate Training \$40,000
- Community Conversation \$20,000
- Total operating expenses, \$118,970

Contract Services

- Training workshops: mandatory and voluntary
- Employee Surveys: administration and report generation

Capital Expenditures: N/A

Projected Savings:

- Elimination of Equity division would result in savings of \$396,100
- Elimination of Advisor position would result in \$126,700 in savings

Cost-Benefit Analysis:

- For the cost savings in budget expenditures for the Equity division through total elimination would subject the County to reputational harm, not being in compliance with legislation (Ontario Human Rights Code, Accessibility Ontarians Disability Act), increased risk to litigation and negatively impacting attraction and retention efforts.
- For cost savings in budget expenditures for the Equity division through service/program/staff reductions (DEI Advisor position) would subject the County to reputational harm, increased risk to litigation and negatively impacting attraction and retention efforts. While at the same time allow the County to remain in alignment with its strategic goal of equity at a slower rate of implementation.

Support Costs:

- There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employees by People and Equity, Finance, IT and Procurement. As well as capital replacement of laptops, monitors, and cell phones where applicable, approximately \$1,000 per year.

5. Service Delivery Impact

Updated Service:

- Service and programs remain the same, but are delivered/provided at a slower rate due to the loss of the Equity Advisor role. The Equity Advisor role has been vacant since June 2025. This vacancy has caused for slower than anticipated implementation of the Equity Strategic Plan.
- Or eliminated/none.

Revised Goals and Objectives:

- If the service and programs are to remain the same but delivered/provided without the support of the Equity Advisor role, the goals and objectives of the division remain the same,

including OHRC and AODA obligations.

- N/A if the Equity Strategic Plan/division is eliminated.

New Service Delivery Model:

- Reduced service: direct service, partnerships, contract out
- Eliminated: contract out (Oversight and implementation of the Equity Strategic Plan)

Impact on Service Recipients:

- If service is reduced or eliminated there will be a negative impact on staff (reduced psychological safety in the workplace) and by extension, negative impact on service delivery.
- Reduction or elimination of the Equity function will likely result in lower scores of inclusion, belonging and psychological safety amongst staff.
- Reduction or elimination of the Equity function will likely have a negative impact on the progress we have made to date in attempting to mitigate and address on ongoing systemic discrimination in the workplace (e.g. policies, practices, decision making processes, organizational culture).

Access and Equity Considerations:

- Persons with disabilities
- Racialized people
- Women
- Black people
- Indigenous people
- Members of 2SLGBTQ+ communities

Quality Assurance Measures:

- If the Equity Strategy/division is eliminated, embedding and operationalizing equity within the organization will become the responsibility of each department and organization. By individualizing systemic work without structure and accountability, the proposed “shared responsibility” across departments and divisions effectively becomes no one’s responsibility. That is to say, equity is likely to be deprioritized, overridden by competing operational demands, and dismissed by leadership without a formal accountability structure in place. Without centralized coordination, equity efforts will become uneven across the organization, creating a patchwork approach that cannot produce systemic changes or an organizational culture shift. This inconsistency and fragmentation will result in some departments being more committed to embedding equity while others may do little to nothing. This signals to staff from equity deserving groups that their inclusion and psychological safety is dependent on which department they work in.

6. Impact Analysis

Alignment with Strategic Goals:

- A reduction in budget support for the Equity function still allows for alignment with long term municipal priorities
- Ongoing support for our Equity function keeps us aligned with AMO's focus on equity. As stated within their [Diversity statement](#) –

*"AMO acknowledges the prevalence of anti-black racism in Canada, Ontario and the communities we serve. All forms of bias, discrimination, marginalization and injustice harm people, our institutions and our society. AMO's members are agents of change. We will work harder and do more to support their important work."*⁷
- In a recent study by Environics, Future Skills Centre and Ted Rogers School of Management, funded by the government of Canada, titled, "[Equity, Diversity and Inclusion Backlash? What Canadian Workers Really Think](#)"⁸ examined Canadians feelings toward EDI in the workplace, some of the key findings included:
 - 54% of Canadian workers view EDI efforts in the workplace positively;
 - 47% of Canadian workers say that their employer's approach to EDI is having a positive impact on their work opportunities;
 - Most respondents in the private, public and non-profit sectors report that EDI initiatives have had either a positive or neutral effect on their own opportunities;
 - Amongst Racialized and 2SLGBTQ communities, 61% and 59% respectively, view EDI in the work place as a good thing;
 - EDI enjoys broad support, and those who are not supportive mostly see it as neutral;
 - **Opposition to EDI is lacking across all groups, never exceeding 15%.**
 - EDI support is tied to personal values, job optimism and income satisfaction; and
 - Economic insecurity and dissatisfaction with job market drive opposition to EDI, but tariff-related worries have not had an impact.
 - Our KPI data shows a positive correlation between implementation of DEI initiatives and improved staff engagement scores (See KPI results above)

A recent article published on January 28, 2026, titled, "[Cultures worth staying for: Embedding DEI in municipal decision making](#)"⁹ in Municipal World, positions DEI as a Governance Framework. Equity, when meaningfully embedded, is a framework for decision making. From this perspective, it guides council and staff on how to consult with communities, how programs are prioritized in budgets, how planning departments consider accessibility, and how communications teams avoid bias in messaging. This lens helps council and municipal administration teams identify unintended consequences before they become costly mistakes.

⁷ Diversity | AMO, 2026, <https://www.amo.on.ca/diversity>

⁸ Equity, Diversity and Inclusion Backlash? What Canadian Workers Really Think, Ted Rogers School of Management's Diversity Institute, <https://www.torontomu.ca/diversity/reports/edi-backlash-what-canadian-workers-really-think/>

⁹ K.Baker. (2026). *Cultures worth staying for Embedding DEI in municipal decision making*, <https://www.municipalworld.com/articles/cultures-worth-staying-for/>

In the recent report titled, "[*Risks of retreat: The enduring inclusion imperative*](#)"¹⁰ by Catalyst, and the New York University School of Law - Meltzer Center for Diversity, Inclusion, and Belonging, indicated that organizations that retreat from efforts aimed at advancing fairness in the workplace through DEI work and programs incur significant risks in four areas: talent, financial, legal and reputational. Key findings from the survey of 2,500 US employees conducted by Catalyst and Meltzer Center for Diversity, Inclusion, and Belonging include:

Talent: Organizations face the threat of a talent drain if they pull back from diversity, equity, and inclusion programs.

- More than three out of four employees (76%) say they are more likely to stay with their employer long term if their employer continues to support diversity, equity, and inclusion. Conversely, more than two out of every five employees (43%) say they will quit if their employer doesn't continue to support DEI, with rates even higher among specific subgroups, including women, Gen Z, and millennial employees. This finding suggests a more immediate risk of "quiet quitting" — employees disengaging without formally leaving their jobs — which results in costly loss of productivity and innovation.
- 99% of respondents across job levels agree with the statement: "All workers should feel respected and welcomed at work, regardless of their background or identity."
- 99% of respondents across job levels agree with the statement: "It's important that my organization supports fair treatment for its workers, including equitable pay."
- In addition, between 79-93% of employees support 11 programs and approaches often implemented to increase diversity of talent, foster inclusive cultures, and build fair systems and structures. Some examples of those programs and their support include:
 - 93%: Employee resource groups (ERGs).
 - 92%: Creating a more inclusive work environment (e.g., accessibility for disabled workers).
 - 90%: Programs intended to increase representation (e.g., internships, mentorship programs, leadership training).
 - 88%: Training on topics like bias, allyship, and inclusion.
 - 86%: Workforce diversity hiring goals.
 - 84%: Recruitment efforts that focus on marginalized groups.
 - 83%: Celebrations of identity (e.g., Pride Month, Black History Month).

Legal: Organizational leaders are more concerned about the increased legal risk of retreating from diversity, equity, and inclusion.

- 68% of the C-suite and 65% of legal leaders say moving away from DEI would create more legal risk for their organization.

¹⁰ Pollack, A., Glasgow, D., Van Bommel, T., Joseph, C., & Yoshino, K. (2025). *Risks of retreat: The enduring inclusion imperative*. Catalyst & Meltzer Center for Diversity, Inclusion, and Belonging.

- Specifically, 64% of the C-suite and 62% of legal leaders agree there is greater risk of litigation alleging discrimination from traditional plaintiffs (e.g., people from marginalized racial and ethnic groups, women, LGBTQ+ people, and people with disabilities) than non-traditional plaintiffs (i.e., members of dominant or majority groups).
- 83% of the C-suite and 88% of legal leaders believe organizations should retain or expand their diversity, equity, and inclusion programs, because reducing or eliminating them will create other types of legal risk, such as the risk of litigation from traditional plaintiffs.
- This data suggests that leaders are weighing the legal risk from traditional complainants more heavily than the legal risk from “reverse” discrimination claimants. Despite the intense media attention on the risk of “reverse” discrimination claims, leaders recognize that traditional discrimination lawsuits have not disappeared and that DEI programs are an important way to mitigate the risk of such claims.

Reputational: In an environment where it is easy for employees and customers to call out organizations on social media, leaders must be alert to the reputational damage their words, actions, and inactions can cause.

- Leaders indicate that while they are “rebranding” diversity, equity, and inclusion initiatives, the substance of and commitment to the work remains firm:
 - 78% of C-suite leaders and 83% of legal leaders say they are rebranding diversity, equity, and inclusion programs with terms such as employee engagement, workplace culture, fairness, or belonging.
 - 62% of C-suite leaders and 60% of legal leaders say their company is either increasing or not changing its investment in diversity, equity, and inclusion.
- Employees, however, are more skeptical. They are less likely than organizational leaders to see a need for rebranding at all. They are also less likely to perceive that DEI efforts are already embedded into the workplace, and are more likely to expect that DEI will become less embedded at their company in the future. These findings suggest that employees are not only experiencing rebranding as retreat, but are also anticipating future retreat. A retreat — whether real or perceived — erodes trust in leadership and substantially threatens the reputational advantages that diversity, equity, and inclusion initiatives confer to companies.

Positive Impacts:

- Reduced staff turnover
- Increased feelings of psychological safety, inclusion and belonging amongst staff
- Increased staff retention
- Increased overall organizational performance
- Increased staff productivity
- Increased staff engagement

- Increased trust in organizational leadership

Negative Impacts:

- Reduced feelings of psychological safety, inclusion and belonging by staff
- Increased risk to reputational harm of the organization
- Increased staff turnover rates
- Reduced service levels (elimination of DEI Advisor role)
- Staff reductions (elimination of DEI Advisor role)
- Community backlash
- Decreased staff productivity
- Decreased staff engagement
- Decreased and eroded trust in organizational leadership

7. Risk Assessment

Identified Risks:

Reputational Harm:

- In the municipal context, retreating on DEI considerations sends a powerful message to employees and communities alike and is particularly damaging.
- It suggests that inclusion is negotiable and contingent, rather than a core organizational value. Public institutions are held to high standards of representation and equity because they are stewards of public trust.
- As stated within the Municipal World Article, “Cultures Worth Staying For”, scaling back DEI efforts does more than risk legal or reputational harm, it undermines the credibility of civic leadership.
- Residents notice when diversity is reduced to symbolic gestures, especially if these gestures are unaccompanied by structural change.
- Moreover, pulling back from DEI can have chilling effects inside the organization. Employees who once felt cautiously optimistic about progress may become disengaged or even leave, taking valuable knowledge and community relationships with them.
- It also signals to historically marginalized groups that their concerns were never truly integral to the mission of local government.

Mitigation Strategies:

If Program is Eliminated

Communications:

- As equity commitments have been made through Council resolutions and strategy adoptions, as a first step, the elimination of the division should also follow the same process and be done through a resolution.
- Develop a communications plan for sharing information about the change with staff, local municipalities, and the public (same audiences and tactics as the release of the Equity Audit

and strategy).

Training:

- Ongoing training would be required for all managers as it relates to analyzing and responding to disaggregated workforce data, developing methodologies for measuring related outcomes, responding and managing complaints of discrimination and workplace inequities (hiring, performance, etc.), developing resources and tools for frequent use toward achieving accessibility, equity, diversity and human rights related divisional and organizational goals, concepts and frameworks such as anti-racism, anti-oppression, anti-colonialism, intersectionality etc.
- If the County wishes to apply for grants such as the Green Municipal Fund (a program of FCM), or apply for accreditations such as the Rainbow Registered Accreditation Program, or CARF, the managers will be responsible for developing and providing supporting documentation such as active strategic plans (equity and accessibility), employee engagement data, terms of reference for DEI committees, public consultation documents with equity deserving groups, applicable policies etc. should they wish to be eligible for consideration of said grants and accreditations. Currently this is all being provided by the Equity division, managers will need training, resources and support to do the same.

8. Compliance and Regulatory Review

Regulatory Requirements:

- N/A

Compliance Status:

- N/A

Legal Implications:

In a recent article titled, "[*The dismantling of DEI programs: A lawyer's response*](#)"¹¹ by Liliane Gingras B.A. Hons., LL.B. Partner at Rubin Thomlinson, a prominent Canadian law firm focused exclusively on workplace and institutional investigations and assessments, training for HR professionals, workplace restoration, and consulting stated "One of the benefits of DEI programs is that they can help organizations comply with their obligations to provide a discrimination-free workplace. In other words, DEI programs can form an important part of an organization's overall compliance strategy. If DEI programs provide compliance support to organizations, it seems to follow that organizations create a legal risk by removing them. This should worry organizations as this line of thinking may cause employees to engage in behaviour that infringes human rights laws. These employees may not be aware that, legally, they can be personally liable for their own discriminatory behaviour, despite the absence of a DEI program in the workplace (for example, as a result of an application against them at the

¹¹ Gingras,L.,(2025). *The dismantling of DEI programs: A lawyer's response*, <https://rubinthomlinson.com/the-dismantling-of-dei-programs-a-lawyers-response/>

Human Rights Tribunal). The main takeaway, from a compliance perspective, is that organizations need to seriously consider the effects of dismantling their DEI initiatives. They also need to consider whether doing so will actively encourage employees to act in a way that is inconsistent with the human rights of others in the workplace. It will be difficult for an organization to, on the one hand, dismantle DEI initiatives, and on the other, convince their employees that a discrimination-free workplace is important. This inconsistency in messaging, is likely to spell trouble for employers.”

- During a recent training titled “*A Practical Guide to Recognizing and Addressing Discrimination in the Workplace*,” provided by Hicks Morely, Canada’s largest boutique law firm specializing in management-side labour and employment law and advocacy, stated that employers are required to take proactive steps to prevent discrimination in the workplace. Additionally, workplaces that are the most committed to EDI are the ones that are the most sheltered against allegations of harassment and discrimination. Furthermore, the Associates delivering the workshop indicated that EDI principles, which are distinctive concepts in practice help to fulfil an employers obligation to proactively prevent harassment and discrimination in the workplace.

9. Stakeholder Feedback

External/Community Input:

- Community Conversations Series

Internal Feedback:

- 2022 Equity Audit
- 2022 Corporate Departmental Townhalls
- 2024 Staff Engagement Survey
- 2025 Human Resources (People & Equity) Organizational Alignment Diagnostic
- 2024 Corporate Departmental Townhalls
- Post training feedback from 2022 – 2025

10. Change Management

Change Management Strategy:

- Leadership should be aligned on the rationale for reducing or eliminating the equity function. Communicating a reduction or elimination without a clear, honest rationale grounded in data will generate distrust and increase perceptions of leaderships inability to make evidence based decisions amongst staff, community members and external stakeholders.
- Develop communications for various audiences including:
 - People & Equity Department
 - Staff from equity deserving groups – Black team members, racialized team members, team members with accessibility needs, LGBTQ+ team members, caregivers, Dufferin

Oaks (as identified within the 2022 Equity Audit and 2024 Staff Engagement Survey)

- People Leaders
- All staff
- Unions (CUPE & ONA)
- Local municipalities
- The public
- Establish a feedback and grievance mechanism that is accessible to all staff and community members to express their comments and concerns about the reduction or elimination of the division.

Stakeholder Engagement Plan:

- Stakeholders will be informed in various ways including:
- Confidential facilitated conversations- People & Equity Department and at the request of any staff or community member.
- Confidential facilitated focus groups - Staff from equity deserving groups – Black team members, racialized team members, team members with accessibility needs, LGBTQ+ team members, caregivers, Dufferin Oaks (as identified within the 2022 Equity Audit and 2024 Staff Engagement Survey), People Leaders, People & Equity Department
- Townhall(s) – All staff
- External communication tactics that were utilized for the public release of 2022 Equity Audit reports and the Equity Strategic Plan – The public, local municipalities

Transition Plan:

- Department leadership will need to receive clear direction in a timely manner on how they are expected to maintain equity obligations in the reduction and/or absence of a dedicated equity function because the County's legal obligations under the AODA and OHRC do not disappear when the function does.
- A minimum transition period of six – nine months for reduction, no less than a year for full elimination.
- Develop mechanisms for post-transition monitoring and reporting.

Municipal Program Assessment: Community Facing Engagement

Department/Division: Climate & Energy Division

Executive Summary

The Climate & Energy Community Communications and Engagement Program delivers approximately 20 annual events and campaigns to raise awareness of climate risks, energy efficiency, and household resilience. While it supports County climate goals, the program is resource-intensive, and outcomes are largely long-term and difficult to quantify.

A streamlined program would focus on targeted, high-impact campaigns aligned with core County programs, supported by digital outreach, partnerships, and integrated communications, with fewer in-person events.

This approach would achieve approximately \$20,000 in annual operating savings, increasing to \$30,000 if the Climate Intern student position is eliminated. Full program elimination would yield approximately \$48,000 annually but is not recommended given the increasing need for strategic engagement and communications capacity.

Two options were explored in this review:

- **Option A – Streamline the program and eliminate the Climate Intern Position:** Retain the Climate Engagement Specialist while reducing the breadth of community engagement and strategically reallocate hours to municipal capacity building. Budget savings: approximately \$30,000 per year.
- **Option B – Eliminate the program:** Discontinue the Climate & Energy Community Communications and Engagement Program. Budget savings: approximately \$48,000 per year.
Note: The report does not recommend full elimination given the increasing need for strategic engagement and communications capacity.

Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Climate & Energy Community Communications and Engagement Program

Department/Division: Public Works - Climate & Energy

Legislative Mandate (if applicable):

There is no direct legislative requirement mandating municipal climate education or outreach programs. However, the program supports several provincial and municipal policy frameworks

including:

- Provincial and Federal Climate Change Action and Resilience goals
- Municipal responsibilities related to emergency preparedness and public health education
- Dufferin County Corporate Strategic Plan
- Dufferin County Climate Action Plan, Adaptation Strategy, and related climate mitigation and adaptation initiatives

Public education supports informed decision-making by residents and contributes to achieving broader climate, energy, and community resilience goals.

Program Description:

The Climate & Energy Community Communications Program provides residents with education, tools, and awareness campaigns related to climate change mitigation, climate adaptation, and household resilience.

The program delivers approximately 20+ community events annually including workshops, information sessions, community fairs, and outreach events. Educational materials, advertising campaigns, and partnerships with local organizations support these activities.

Topics addressed through the program include:

- Home flood prevention and climate adaptation
- Energy efficiency and home retrofit education
- Electric vehicle awareness and transportation emissions reduction
- Tick awareness and prevention
- Household energy conservation and cost savings

The program aims to empower residents with knowledge that supports safer homes, reduced energy costs, and improved community resilience to climate change.

Goals and Objectives:

The current program supports several objectives aligned with County strategic priorities:

A. Climate and Environment Goals

- Increase community awareness of climate risks and adaptation strategies
- Support emissions reduction through behaviour change and energy efficiency
- Promote electrification and low-carbon transportation
- Improve household resilience to extreme weather

B. Community and Economic Goals

- Reduce household energy costs through education on efficiency
- Support uptake of programs such as BetterHomes Dufferin
- Increase awareness of environmental health risks (e.g., ticks)
- Helps advance public awareness required to support climate-related programs and investments

Strengths:

- Reaches residents directly through workshops, events, and campaigns.
- Supports multiple County initiatives including climate adaptation, energy efficiency, and public health awareness.
- Provides preventative education (e.g., flood preparedness) that can reduce future municipal costs and damages.
- Builds trust and relationships with community organizations and residents.
- Supports uptake of other County programs such as retrofit and climate initiatives.
- Flexible and scalable program with modest operating budget.
- Delivered through partnerships that leverage community networks and increase reach.

Weaknesses:

- Impact measurement is difficult as behaviour change outcomes can be long-term and indirect.
- Limited budget restricts the scale of advertising and outreach.
- Program relies heavily on staff capacity to organize events and develop educational materials.
- Engagement levels can fluctuate depending on season, event attendance, and external factors.
- Some educational campaigns may have overlapping messaging with other divisions, organizations or levels of government.

Current Delivery Method:

The program is delivered through a mix of:

- Direct delivery by Climate & Energy staff (mainly)
- Partnerships with local municipalities, community organizations, and regional initiatives
- Contracted services for advertising, printing, and promotional materials
- Community events and workshops
- Digital communications and educational campaigns

2. Potential Changes

Reducing or eliminating services/programs

- Reducing the number of annual community events
- Limiting advertising and promotional campaigns
- Reducing printed educational materials
- Eliminating participation in some external community events

Providing services using an alternate delivery method

- Increasing reliance on digital education resources instead of in-person events, or more virtual events
- Partnering with local municipalities or community groups to deliver workshops
- Integrating educational messaging into other County communication channels
- Using regional or provincial resources where available

Implementing productivity enhancements through process redesign and/or technology

- Standardizing educational materials and toolkits
- Creating more reusable campaign material
- Expanding online webinars instead of in-person events

3. Key Performance Indicators (KPIs)

Current KPIs:

- Number of community events delivered annually
- Workshop attendance
- Educational materials distributed
- Digital engagement metrics (website visits, social media engagement)
- Participation in climate-related programs (e.g., Exp. Acres)

Impact on KPIs:

- Reduced public awareness of climate risks and household preparedness
- Lower engagement with County climate initiatives
- Reduced uptake of energy efficiency programs
- Reduced participation in community education events

Data Collection Methods:

- Event attendance records
- "Community Conversations" at events
- Participant feedback surveys
- Website and newsletter analytics
- Social media engagement metrics
- Program participation tracking

Baseline Data: Existing performance data before change.

- Approximately 20+ community events and workshops annually
- Participation from hundreds of residents across Dufferin County communities
- Distribution of educational materials through events and campaigns (exact number is difficult to obtain)

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs, include estimated time staff spend on program

- Climate Engagement Specialist, 50% of time = \$59,450
- Climate and Energy Manager, 1 hour/week, 40 weeks/year=\$3,300
- Climate Intern, 30 hours/week, 16 weeks = \$12,600

Operating Expenses, what expenses can be attributed to this program

- Engagement budget approximately \$30,000 per year, covers:
 - Advertising campaigns
 - Educational materials
 - Event costs
 - Workshop facilitation materials
 - Printing and promotional items

*Note: Sometimes these expenses are offset by funding.

- Contract Services, are any parts of this program contracted out
 - Project dependent, sometimes video creation or photography, approx. \$8,000 annually
- Capital Expenditures, what capital costs are associated with this program
 - None

Projected Savings: Estimated financial impact.

- If eliminated, \$38,000 in program related costs would be saved as well as \$15,900 for intern (Staff time savings would depend on reallocation of responsibilities.)

Cost-Benefit Analysis: Evaluation of costs saved vs. benefits lost.

Costs saved if eliminated:

- \$53,900 annual operating budget
- Reduced staff coordination time

Benefits Lost if eliminated:

- Reduced public awareness of climate risks
- Reduced engagement in climate and energy programs
- Reduced household preparedness for climate impacts
- Reduced participation in retrofit and energy programs

The financial savings are modest relative to potential long-term benefits associated with preventative education and behaviour change.

Support Costs:

- Some Communications support when sharing materials; some Finance support if there is funding associated with a program
- There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee. There is also the time associated with supporting the employee by People and Equity, Finance, IT and Procurement.

5. Service Delivery Impact

Updated Service:

If reduced, the program could transition to:

- Limited educational campaigns delivered primarily online
- Fewer in-person events and workshops

- Reduced advertising and printed materials
- If reduced: none

Revised Goals and Objectives: (list revised)

If reduced:

- Maintain basic public awareness through digital communications
- Support priority climate programs through targeted messaging

New Service Delivery Model:

Possible models:

- Reduced direct delivery, including public engagement and event attendance
- Increased reliance on digital outreach
- Partnerships with community organizations like HCIA to deliver education

Impact on Service Recipients:

Residents across Dufferin County would experience:

- Reduced access to educational workshops
- Fewer opportunities to learn about energy efficiency and climate adaptation
- Reduced awareness of household risk reduction strategies
- If there's an increased reliance on digital delivery, vulnerable populations or those with unreliable internet access would be excluded

Access and Equity Considerations:

Reducing in-person outreach could disproportionately affect:

- Residents without reliable internet access
- Older adults who rely more on in-person education
- Rural residents who benefit from local community events
- Those not on social media

Quality Assurance Measures:

Remaining communications activities would:

- Align with County communication standards
- Use verified information sources
- Continue collaboration with partners where possible

6. Impact Analysis

Alignment with Strategic Goals:

The program supports:

- Climate Action Plan implementation
- Corporate Strategic Plan sustainability goals
- Community resilience and public education

Reducing or eliminating the program may weaken the County's ability to achieve

these goals.

Positive Impacts:

- Reduce Operating costs
- Reduced staff time associated with event coordination

Negative Impacts:

- Reduced public engagement on climate initiatives
- Reduced awareness of climate risks and adaptation strategies
- Lower participation in energy and retrofit programs
- Potential reputational impact if climate leadership commitments are reduced

7. Risk Assessment

Identified Risks: Financial, operational, reputational, or other risks associated with change.

- Reduced community awareness of climate-related risks
- Reduced uptake of County programs making them less effective or accessible to those that need them
- Perception that climate commitments are being reduced
- Missed opportunities for preventative education to enhance community resilience

Mitigation Strategies: Steps to manage or reduce risks.

- Prioritize highest-impact campaigns
- Partner with local organizations to deliver education
- Focus on digital outreach where possible
- Integrate messaging into other County communications

8. Compliance and Regulatory Review

Regulatory Requirements:

- None specifically requiring the program

Compliance Status:

- The program aligns with municipal policies and climate strategies.

Legal Implications:

No direct legal implications if reduced or eliminated

9. Stakeholder Feedback

External/Community Input: Summary of feedback from residents, community groups, or stakeholders regarding the proposed change.

- Residents generally respond positively to educational workshops and community events, particularly those related to:
 - energy efficiency
 - flood prevention

- household cost savings
- biodiversity
- Community partners often support collaboration on outreach initiatives.

Internal Feedback: N/A

10. Change Management

Change Management Strategy: Outline how reduction/elimination will be communicated and managed.

If reductions are implemented:

- Communicate clearly with residents about program change
- Focus messaging on priority initiatives
- Transition educational materials to online platforms where possible

Stakeholder Engagement Plan: How stakeholders will be informed and involved throughout the process.

- Inform community partners and municipalities of changes
- Maintain collaboration where possible
- Provide alternative resources or educational materials when requested

Transition Plan:

Potential steps:

- Identify priority educational campaigns to maintain.
- Reduce the number of annual events and workshops
- Shift resources toward digital communications.
- Reallocate staff time toward priority climate initiatives and investigate internal capacity-building activities.

Municipal Program Assessment: Experimental Acres Program

Department/Division: Climate & Energy Division

Executive Summary

The Experimental Acres Program supports farmer-led trials of innovative agricultural practices that improve soil health, enhance climate resilience, and reduce greenhouse gas emissions. Delivered through a contract with Grey Agricultural Services, the program provides small grants and technical guidance for local farmers to test new practices and share results with the broader agricultural community.

Two options were considered in this review:

- **Option A – Eliminate the Experimental Acres Program**

Under this option, the program would be discontinued.

Budget savings: \$10,000 in operating costs and approximately \$1,374 in staff time that could be reallocated.

- **Option B – Maintain the Experimental Acres Program**

This option maintains the current delivery model through Grey Agricultural Services, with opportunities for minor refinements such as enhanced knowledge-sharing, stronger partnerships, and pursuit of external funding.

Budget savings: None

Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: [Experimental Acres](#)

Department/Division: Public Works - Climate & Energy

Legislative Mandate (if applicable):

There is no legislative requirement for municipalities to operate agricultural innovation programs. However, the program supports several provincial and municipal priorities, including:

- Provincial and Federal Climate Change Action and Resilience goals
- Agricultural sustainability and soil health initiatives
- Dufferin County Corporate Strategic Plan
- Dufferin County Climate Action Plan and Adaptation Strategy

Agriculture is a significant land use and economic sector in Dufferin County, and supporting climate-resilient agricultural practices contributes to both environmental and economic resilience. The Experimental Acres Program delivers meaningful environmental, agricultural, and community benefits at a relatively low cost to the County.

Program Description:

The Experimental Acres Program provides small grants and technical support to local farmers to test innovative agricultural practices that improve soil health, reduce greenhouse gas emissions, and increase resilience to climate impacts.

Farmers participating in the program conduct on-farm trials of new practices, technologies, or land management approaches. Results are shared with the broader agricultural community and participants in neighbouring Wellington and Grey Counties where local Experimental Acres Programs also run, to encourage knowledge transfer and adoption of successful practices.

Projects may include testing practices such as:

- Cover cropping
- Soil health improvements
- Reduced tillage or regenerative agriculture practices
- Water retention and soil moisture management
- Biodiversity, beneficial insects, or habitat improvements on farms

The program aims to reduce barriers for farmers to test new practices and to build local knowledge about climate-resilient agriculture. It also serves as a pipeline for farmers to engage in larger projects with proven best practices through the Rural Water Quality Program.

Goals and Objectives:

The program supports several objectives aligned with County strategic priorities:

- A. Climate and Environment Goals
 - In Reduce agricultural greenhouse gas emissions
 - Improve soil carbon sequestration and soil health
 - Increase resilience to extreme weather events
 - Support biodiversity and ecosystem health
- B. Community and Economic Goals
 - Support innovation within the agricultural sector
 - Improve long-term farm productivity, soil quality, and food security
 - Strengthen relationships between the County and local farmers
 - Encourage peer-to-peer learning within the farming community

Strengths:

Directly engages the agricultural community in climate solutions.

- Encourages locally relevant experimentation and innovation.
- Helps reduce financial risk for farmers testing new practices.
- Supports soil health and long-term agricultural productivity.
- Builds relationships between the County and farming community.
- Generates local knowledge that can be shared across farms.
- Demonstrates County leadership in agricultural sustainability.

Weaknesses:

- Limited program scale due to modest funding levels.
- Measuring environmental impacts (e.g., emissions reductions) can be complex.
- Program administration requires some staff time for application review, project coordination, and reporting, but most of the work is contracted by Grey Ag Services
- Participation levels may vary depending on farmer interest, economic conditions, or weather.
- Agricultural innovation programs are also offered by provincial and federal agencies, which may overlap with program goals.

Current Delivery Method:

The Experimental Acres program is primarily delivered through a contracted service agreement with Grey Agricultural Services, with Dufferin County providing program oversight and financial administration.

Grey Agricultural Services (contracted program delivery) is responsible for:

- Program design and annual program coordination
- Promotion and outreach to farmers
- Managing the application and selection process
- Working directly with participating farmers to design trials
- Providing technical guidance and monitoring project implementation
- Supporting on-farm data collection and evaluation methods (e.g., soil testing, infiltration testing, compaction monitoring)
- Documenting results and preparing annual outcomes reports
- Facilitating knowledge-sharing with the agricultural community

Dufferin County responsibilities include:

- Program funding and financial administration
- Contract management with Grey Agricultural Services
- Coordination of grant payments to participating farmers
- Strategic alignment of the program with the County’s Climate Action Plan and Adaptation Strategy
- Internal reporting and performance tracking
- Communications coordination where appropriate

- This model allows the program to leverage agricultural expertise and existing relationships within the farming community, while minimizing the internal staff capacity required to administer a specialized agricultural innovation program.

2. Potential Changes

Describe areas under consideration

Reducing or eliminating services/programs

- Program elimination and discontinuation of funding for Experimental Acres is the only scenario being explored. Program reduction is not reasonable given the lean and cost-effective design of the program

Providing services using an alternate delivery method

- N/A – already contracted out to the only service provider available.

Implementing productivity enhancements through process redesign and/or technology

- N/A

3. Key Performance Indicators (KPIs)

Current KPIs:

- Number of applications and expressions of interest
- Number of farms participating annually
- Number of projects funded each year
- Acres of farmland involved in trial
- Types of agricultural practices tested
- Knowledge-sharing outputs (reports, demonstrations, outreach)

Impact on KPIs:

If the program were eliminated:

- Local opportunities for farmer-led experimentation would be significantly reduced
- Fewer opportunities would exist to test innovative practices under local conditions
- Knowledge-sharing within the agricultural community would decline
- County engagement with the agricultural sector on climate-related issues would decrease

If maintained:

- The program can continue supporting local agricultural innovation
- Lessons learned from projects can inform broader agricultural practices in the region
- The program can help demonstrate practical approaches to improving soil health and climate resilience

Data Collection Methods:

- Farmer project reports and documentation

- Monitoring of soil health indicators and project outcomes
- Staff program tracking
- Feedback from participating farmers

Baseline Data:

- 3-5 Farmers participating annually
- Previously funded farmers have returned to the program or registered to maintain relationships and share learnings without any funding requests. Maintaining this relationship allows for multi-year testing of soil.
- 10 unique innovative methods to enhance farm sustainability tested to date

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs, include estimated time staff spend on program

- Climate Engagement Specialist, 2 hours/month for 8 months = \$1,045
- Climate and Energy Manager, 30 minutes/month for 8 months = \$330

Covers:

- Contract management and oversight
- Financial administration of grants
- Coordination with Grey Agricultural Services
- Internal reporting and alignment with climate programs

Operating Expenses

Experimental Acres Budget is 10,000, covers:

- Grants to participating farmers
- Soil-testing and postage
- Contract Services

Contract Services:

- Grey Ag Services for program administration, farmer outreach and engagement, technical guidance for project design and monitoring, documentation and reporting outcomes, travel

Capital Expenditures: None

Projected Savings:

- If eliminated, \$10,000 in operating would be saved; \$1,374 value of staff time would be able to be re-allocated

Cost-Benefit Analysis:

Costs saved if eliminated:

- \$10,000 annual operating budget
- Reduced staff coordination time

Benefits Lost if eliminated:

- Reduced support for agricultural innovation
- Loss of a program specifically designed for farmer-led experimentation
- Reduced engagement with the agricultural sector
- Loss of locally generated knowledge about climate-resilient agricultural practices

Given the relatively modest cost of the program, the potential benefits to soil health, agricultural productivity, and climate resilience outweigh the financial savings associated with elimination. Furthermore, the program provides unique benefits that are difficult to replicate through other County programs.

Support Costs: Some Communications support when sharing materials.

5. Service Delivery Impact

Updated Service: If eliminated, none

Revised Goals and Objectives: If eliminated, none

New Service Delivery Model: N/A - The recommended model is to maintain the current partnership with Grey Agricultural Services, while exploring opportunities to improve efficiency and leverage additional funding sources.

Impact on Service Recipients:

If the program were eliminated:

- Farmers would lose access to a program designed to reduce the risk of testing innovative practices
- Opportunities to share knowledge among local farmers would decline
- Fewer locally relevant agricultural innovations would be demonstrated to support soil health and food security

Access and Equity Considerations:

The program supports farmers of varying scales who may not otherwise have the financial capacity to test innovative practices.

Elimination could disproportionately affect:

- Smaller farms with limited resources for experimentation who are more susceptible to climate disruptions
- Farmers interested in sustainable practices but lacking access to research funding

Quality Assurance Measures: N/A

6. Impact Analysis

Alignment with Strategic Goals:

The Experimental Acres program directly supports:

- The Dufferin Climate Action Plan
- Climate adaptation and resilience objectives

- Agricultural sustainability and soil health goals

Eliminating the program may weaken the County’s ability to achieve climate goals in the agricultural sector, as there are already limited programs in that area..

Positive Impacts:

- Reduce Operating costs (minimal)
- Reduced staff time associated with financial administration and coordination (minimal)

Negative Impacts:

- Reduced engagement with the agricultural community
- Fewer opportunities for farmers to test innovative practices
- Potential reputational impacts if the County is perceived as reducing support for agriculture

7. Risk Assessment

Identified Risks:

- Reduced support for agricultural innovation
- Reduced engagement with farmers on climate initiatives
- Loss of a locally relevant demonstration program

Mitigation Strategies:

To reduce risks while maintaining the program:

- Continue delivery through Grey Agricultural Services
- Explore additional funding sources
- Focus funding on projects with strong knowledge-sharing potential

8. Compliance and Regulatory Review

Regulatory Requirements: None specifically requiring the program

Compliance Status: The program aligns with municipal policies and climate strategies.

Legal Implications: No direct legal implications if reduced or eliminated

9. Stakeholder Feedback

External/Community Input: Summary of feedback from residents, community groups, or stakeholders regarding the proposed change.

- Feedback from the agricultural community has been overwhelmingly positive.
- Repeat applicants and returning participants indicate strong program value and ongoing interest.
- Farmers appreciate the opportunity to test innovative practices with reduced financial risk.
- The program’s farmer-led approach allows producers to address real challenges on their farms.
- Experimental Acres has helped strengthen relationships between Dufferin County,

agricultural service providers, and local farmers.

- The program generates locally relevant knowledge and encourages knowledge-sharing across the agricultural community.

Internal Feedback: N/A

10. Change Management

Change Management Strategy:

- Given the value of the program and the relatively modest budget required to maintain it, continuation of the program with minor refinements is recommended.
- Potential improvements include:
 - Strengthening knowledge-sharing from completed projects, including better reporting to Council
 - Increasing collaboration with agricultural partners
 - Seeking additional external funding opportunities

Stakeholder Engagement Plan:

- Maintain communication with participating farmers and agricultural partners
- Share results from Experimental Acres projects with the broader agricultural community
- Continue collaboration with Grey Agricultural Services

Transition Plan: N/A

Municipal Program Assessment: Rural Water Quality Program

Department/Division: Climate & Energy Division

Executive Summary

The Rural Water Quality Program is a cost-effective, partnership-based initiative that delivers measurable environmental outcomes by leveraging County funding to support rural landowners in implementing water protection projects.

Two options were reviewed as part of this assessment:

- **Option A – Retain Program (Status Quo)**

In 2025 alone, \$65,619 in grants supported over \$219,000 in total project value, demonstrating strong return on investment and alignment with County climate, watershed, and infrastructure risk reduction goals.

Budget Savings: None

- **Option B - Reducing or eliminating services/programs**

Includes a review of reducing annual grant allocations, limiting eligible project types, pausing program intake and eliminating the program.

Budget Savings: \$60,000 in annual savings for full elimination; and short term or variable for partial reductions

Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: [Rural Water Quality Program](#)

Department/Division: Public Works - Climate & Energy

Legislative Mandate (if applicable):

There is no direct legislative requirement for the County to deliver this program. However, it supports:

- Source Water Protection objectives under the Clean Water Act, 2006
- Provincial and conservation authority priorities related to watershed health
- Municipal responsibilities related to environmental protection and rural stewardship

Program Description: Brief summary of the program's purpose, objectives, and target population.

The Rural Water Quality Program provides financial incentives and technical support to rural

landowners to implement projects that protect and improve groundwater and surface water quality. The program is delivered in partnership with Local Conservation Authorities (e.g., Grand River, Nottawasaga Valley, Credit Valley), Agricultural stakeholders and rural residents. The Grand River Conservation Authority serves as the administrative lead for the program.

Eligible projects may include:

- Well upgrades and decommissioning
- Septic system repairs or replacements
- Erosion control and runoff mitigation
- Livestock exclusion fencing from watercourses
- Nutrient management improvements
- Tree planting and buffer restoration

Goals and Objectives: Provide specific goals and objectives and associated plan (e.g. items that support corporate strategic plan, other long-term plan, or division work plan)

The program supports several objectives aligned with County strategic priorities:

Project goals and objectives:

- Protect groundwater and surface water quality in rural areas
- Reduce contamination risks from private systems (wells, septic)
- Support agricultural best management practices
- Improve watershed health and ecosystem resilience
- Advance climate adaptation by reducing runoff, erosion, and pollution risks

The program supports:

- Climate Action Plan (adaptation + natural infrastructure)
- Watershed and source water protection goals
- Long-term infrastructure risk reduction
- Climate & Environment goals under Dufferin's Corporate Strategic Plan

Strengths: Areas where the program is performing well, even if reduced.

- Direct, measurable environmental outcomes (installed BMPs)
- Strong partnerships with Conservation Authorities
- Cost-effective model leveraging landowner investment
- Preventative approach reducing long-term municipal and environmental risks
- High alignment with agricultural and rural community needs.
- Supports climate adaptation (flooding, runoff, drought resilience)

Weaknesses:

- Limited funding restricts number of projects annually
- Reliant on landowner participation and awareness
- Administrative effort required for intake, review, and reporting
- Benefits may be less visible to the broader public compared to other programs

Current Delivery Method: (e.g., direct delivery, partnerships, contract out)

- Partnership delivery with Conservation Authorities leading (County serves as the funder)
- Cost-share grant model for eligible projects
- Technical review and support provided through partners
- Promotion through County and partner communications

The program provides preventative, on-the-ground benefits that reduce long-term environmental and infrastructure risks, supports the agricultural community, and advances climate adaptation

2. Potential Changes

Option A – Retain Program (Status Quo)

Option B - Reducing or eliminating services/programs

- Options include:
 - Reducing annual grant allocation
 - Limiting eligible project types
 - Pausing program intake
 - Eliminating program

Few revenue opportunities exist; however external grant funding opportunities could be explored.

3. Key Performance Indicators (KPIs)

Current KPIs:

- Number of projects funded annually
- Total value of projects leveraged (County + landowner investment)
- Type and number of BMPs implemented
- Estimated environmental benefits (e.g., nutrient reduction, erosion control)
- Geographic distribution of projects)

Impact on KPIs: How will reduction/elimination affect performance metrics?

If the program were eliminated:

- Reduced implementation of water protection projects
- Lower uptake of BMPs by rural landowners
- Increased risk of contamination from aging infrastructure (wells, septic systems)
- Reduced ability to track and report environmental improvements

Data Collection Methods: (e.g., surveys, reports, monitoring systems)

- Program application records
- Conservation Authority reporting
- Project completion verification

- Environmental outcome estimates (where available)

Baseline Data: Existing performance data before change.

- 2025 included 31 projects, \$65,619.74 awarded in grants for project value totaling \$219,975.01 (note there was carry over funds from 2024)

Project Type	Num Projects	Total Capital Cost (inc. tax)	Payment Amount
Cover Crops	6	\$92,065.00	\$14,400.00
Crop Nutrient Plan	1	\$3,639.60	\$2,000.00
Livestock Access Restriction	1	\$11,041.94	\$5,000.00
Natural Area Restoration	1	\$16,893.50	\$5,000.00
Tree Planting	8	\$55,511.59	\$21,249.35
Wellhead Abandonment	11	\$28,868.70	\$14,970.39
Wellhead Protection	3	\$11,954.68	\$3,000.00
Report Totals:	31	\$219,975.01	\$65,619.74

4. Budget and Financial Analysis

Current Budget Breakdown:

- Operating Expenses, what expenses can be attributed to this program
 - \$60,000/year for grants
 - Climate and Energy Manager time, 5 hours per year = \$420 per year which would be reallocated to other work.
- Contract Services, are any parts of this program contracted out
 - Technical review and delivery largely supported by Conservation Authorities, review committee is volunteers that also support the Wellington RWQP
- Capital Expenditures, what capital costs are associated with this program
 - None (Grants)

Projected Savings: Estimated financial impact.

- If eliminated, \$60,000 in operating would be saved;

Cost-Benefit Analysis: Evaluation of costs saved vs. benefits lost.

Costs saved if eliminated:

- \$60,000 annual operating budget
- Minor administrative savings

Benefits Lost if eliminated:

- Loss of leveraged private investment
- Increased long-term environmental and infrastructure risks
- Potential downstream costs related to water contamination, erosion, and flooding
- Preventative investments through this program are typically more cost-effective than

remediation.

Support Costs: What interdepartmental support is required for this program (IT, Finance, Procurement, Communications, etc.)

- Some Communications support when sharing materials.

5. Service Delivery Impact

Updated Service: (Describe what new service looks like, what programs are being offered, if eliminate mark as "none")

- If eliminated, none

Revised Goals and Objectives: If eliminated, none

New Service Delivery Model: N/A

Impact on Service Recipients: Affected groups:

- Rural homeowners with private wells and septic systems
- Farmers and agricultural operators
- Landowners near watercourses

Impacts include:

- Reduced financial support for environmental improvements
- Potential delay or cancellation of beneficial projects

Access and Equity Considerations:

Reduction may disproportionately affect:

- Rural residents with limited financial capacity
- Agricultural operators managing environmental compliance pressures
- Areas with higher environmental vulnerability

Quality Assurance Measures:

- Continued reliance on Conservation Authority technical expertise
- Standardized project eligibility and review processes

6. Impact Analysis

Alignment with Strategic Goals:

The RWQP program directly supports:

- Climate adaptation and watershed resilience
- Environmental protection and sustainability
- Rural community support and stewardship
- Risk-based asset and infrastructure management

Eliminating the program may weaken the County's ability to achieve climate goals in the agricultural sector, as there are already limited programs in that area..

Positive Impacts:

- Reduce Operating costs (minimal)
- Reduced staff time associated with financial administration and coordination (minimal)

Negative Impacts:

- Reduced water quality protection measures
- Increased environmental risk over time
- Loss of partnership leverage
- Reduced progress toward climate and watershed goals

7. Risk Assessment

Identified Risks:

- Increased contamination risks to groundwater and surface water
 - Degradation of watershed health
 - Increased future costs related to environmental remediation
 - Reduced participation in stewardship activities

Mitigation Strategies:

To reduce risks while maintaining the program:

- Target limited funding to highest-risk areas
- Seek external funding sources
- Strengthen partnerships with Conservation Authorities
- Increase education and awareness effort

8. Compliance and Regulatory Review

Regulatory Requirements: None specifically requiring the program

Compliance Status: The program aligns with municipal policies and climate strategies.

Legal Implications: No direct legal implications if reduced or eliminated

9. Stakeholder Feedback

External/Community Input:

- Generally strong support from rural landowners and agricultural community
- Positive feedback from Conservation Authorities
- Recognition of financial incentives as key enabler for project uptake

Internal Feedback: N/A

10. Change Management

Change Management Strategy:

If changes occur:

- Communicate clearly with program partners and applicants

- Provide advance notice of funding changes
- Update program materials and application processes

Stakeholder Engagement Plan:

- Direct communication with Conservation Authorities
- Outreach to agricultural and rural stakeholders
- Updates through County communication channels

Transition Plan: N/A

Municipal Program Assessment: Youth Climate Activation Circle (YCAC)

Department/Division: Climate & Energy Division

Executive Summary

The Youth Climate Activation Circle (YCAC) is a volunteer leadership program that empowers Dufferin youth (ages 16–25) to design and implement community climate action projects aligned with the Dufferin Climate Action Plan. The program builds climate literacy, leadership skills, and civic engagement while supporting community awareness of climate solutions.

Three options were explored in this assessment:

- **Option A – Continue the Program**

Annual program costs: \$10,000 in operating expenses, \$5,300 for a part-time program assistant, and approximately \$13,100 in staff time.

Delivers ongoing climate engagement, youth leadership development, and community outreach that supports County climate priorities.

Budget savings: None

- **Option B – Eliminate the Program**

Would result in reduced youth engagement in climate action and loss of leadership development opportunities.

Budget savings: approximately \$15,300 annually, plus staff time redeployment.

- **Option C – Contract Delivery to a Third Party**

Based on comparable coordination rates and overhead, external delivery is estimated to cost \$45,000–\$60,000 annually, significantly higher than the current model.

Budget savings: Increased annual costs compared to current delivery; no savings identified.

Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: [Youth Climate Activation Circle](#)

Department/Division: Public Works - Climate & Energy

Legislative Mandate

There is no legislative requirement for municipalities to operate youth climate engagement programs. However, the program supports several provincial and municipal priorities including:

- Provincial and Federal Climate Change Action and Resilience goals
- Youth engagement and civic participation initiatives
- Dufferin County Corporate Strategic Plan
- Dufferin County Climate Action Plan and Adaptation Strategy

The Climate Action Plan is a community-wide strategy and requires public participation and engagement to achieve emissions reduction targets.

Program Description:

The Youth Climate Activation Circle (YCAC) is a volunteer program that empowers youth (ages 16–25) to develop and implement community-based climate action initiatives.

- Participants work as a cohort to:
- Build knowledge about climate change and climate justice
- Develop leadership, collaboration, and project management skills
- Design and implement a community climate action project
- Engage residents and stakeholders through outreach and events

The program includes training sessions, mentorship from community experts, and hands-on project development.

The program aims to:

- Support implementation of the Dufferin Climate Action Plan
- Empower youth to become leaders in climate action
- Foster long-term engagement in climate solutions

The YCAC model recognizes youth as important messengers and leaders in community climate action.

Goals and Objectives:

The program supports several objectives aligned with County strategic priorities:

- A. Climate and Environment Goals
 - Support implementation of the Dufferin Climate Action Plan
 - Advance local climate solutions through youth-led projects
 - Increase climate literacy and awareness in the community
- B. Community and Social Goals
 - Build youth leadership capacity in climate action
 - Provide opportunities for youth to participate in civic decision-making
 - Strengthen youth connections to community organizations and mentors
 - Foster long-term engagement in climate-related careers and initiatives

Strengths:

- Directly engages the agricultural community in climate solutions.
- Directly engages youth in climate action and local governance.
- Builds leadership, teamwork, and project management skills among participants.
- Creates opportunities for youth to connect with local climate professionals and community

leaders.

- Supports community awareness and dialogue about climate action.
- Program evaluation results demonstrate improvements in climate knowledge, teamwork skills, and confidence among participants.
- Strengthens relationships between the County and younger residents.

Weaknesses:

- The program requires consistent staff coordination and facilitation.
- Participation numbers are limited due to the cohort-based program model.
- Youth schedules (school, work) can create scheduling challenges.
- Program impacts on emissions reductions can be difficult to quantify in early years.

Current Delivery Method:

The program is delivered directly by Dufferin County Climate & Energy staff.

Key roles include:

A. Climate Engagement Specialist, responsible for:

- Program design and coordination
- Youth recruitment and selection
- Facilitating meetings and training sessions
- Supporting youth project design and implementation
- Managing partnerships and guest speakers
- Program evaluation and reporting

Estimated time commitment: 4 hours/week

B. YCAC Program Assistant (Student PT Contract Position), responsibilities include:

- Administrative coordination
- Event planning and logistics
- Communications and outreach
- Supporting youth project implementation

Contract time commitment: 5 hours/week for 10 months

2. Current Program Overview

Reducing or eliminating services/programs

The primary scenario being explored is program elimination and discontinuation of YCAC. The program cannot be reduced significantly without affecting its ability to operate, as it already functions with a small budget and minimal staffing.

Providing services using an alternate delivery method

- Contracting the Youth Climate Activation Circle (YCAC) program to a third-party organization was considered as an alternative delivery model. Based on the scope of work required, (including program design, youth recruitment, meeting facilitation, mentorship coordination, event planning, project implementation support, and program evaluation) a

contracted provider would likely require a dedicated program coordinator and organizational overhead.

- Typical program coordination rates for non-profit or consulting organizations range from \$60–\$100 per hour. Assuming approximately 8–12 hours per week over a 10-month program cycle, program delivery costs would be approximately \$30,000–\$40,000 annually. When organizational overhead (20–40%) and program operating costs (approximately \$10,000) are included, total annual program costs could range from \$45,000–\$60,000.

3. Key Performance Indicators (KPIs)

Current KPIs:

- Number of applications received
- Number of youth participating annually
- Number of training/workshop sessions delivered
- Number of community members engaged through projects
- Participant learning outcomes as outlined in the program logic model

Impact on KPIs:

If the program were eliminated:

- Youth engagement in climate action would decline
- Opportunities for youth leadership development would be lost
- Community outreach through youth-led initiatives would decrease

Data Collection Methods:

- Pre- and post-program participant surveys
- Program evaluation surveys
- participant interviews and feedback
- project documentation

Baseline Data:

Program evaluation results show improvements in:

- climate knowledge and confidence
- teamwork and leadership skills
- sense of community belonging
- ability to discuss climate change and solutions

Participants also reported increased awareness of climate-related career pathways and increased confidence participating in community initiatives

4. Budget and Financial Analysis

Current Budget Breakdown:

Climate Engagement Specialist

- 4 hours/week × 50 weeks = \$13,100

Program Assistant (Student)

- 5 hours/week × \$22/hr × 10 months = \$5,300

Operating Expenses

YCAC Budget is \$10,000 per year, covers:

- Workshop/guest speaker fees
- venue rentals when necessary
- event materials and printing
- youth project implementation costs (e.g. native plants, supplies, etc)

Contract Services:

- Program Evaluation is contracted out and is included in the operating costs in the year they occur (approx. \$2000)

Capital Expenditures: None

Projected Savings:

- If eliminated, \$10,000 in operating would be saved; \$5,300 for YCAC program assistance position wouldn't be required; \$13,100 value of Climate Engagement staff time would be able to be re-allocated

Cost-Benefit Analysis:

Costs saved if eliminated:

- \$10,000 annual operating budget
- Reduced staff coordination time

Benefits Lost if eliminated:

- Youth leadership development opportunities
- youth engagement in climate action
- Community climate outreach through youth-led initiatives
- Improved climate literacy among youth participants

Support Costs:

- Some Communications support when sharing materials.

5. Service Delivery Impact

Updated Service: If eliminated, none

Revised Goals and Objectives: If eliminated, none

New Service Delivery Model: N/A

Impact on Service Recipients:

If the program were eliminated:

- Youth would lose an opportunity to participate in local climate action
- Fewer youth leadership opportunities would exist within the County

- Fewer youth voices would be represented in climate discussions

Access and Equity Considerations:

Youth, particularly those from equity-deserving communities, are disproportionately impacted by climate change. Climate impacts such as extreme weather, economic instability, and environmental health risks often affect marginalized populations more severely, and young people will experience the long-term consequences most acutely over their lifetimes.

The Youth Climate Activation Circle provides opportunities for youth to participate in local climate action and leadership, while prioritizing inclusion of equity-deserving groups. By supporting youth voices and participation in climate decision-making, the program advances climate justice principles and ensures diverse perspectives are represented in local climate solutions.

Quality Assurance Measures: N/A

6. Impact Analysis

Alignment with Strategic Goals:

- Eliminating the program does not support municipal priorities and long-term plans. Eliminating the program may weaken the County's ability to achieve climate goals as there are already limited programs in that area.

Positive Impacts: modest Operating cost savings

- Reduced staff time associated with financial administration and coordination (minimal)

Negative Impacts:

- loss of youth climate leadership programming
- Reduced community engagement
- Reduced support for youth climate education

7. Risk Assessment

Identified Risks:

Reduced youth engagement in County initiatives

- Reputational risk if youth engagement commitments are reduced
- Fewer opportunities to build future climate leadership

Mitigation Strategies:

To reduce risks while maintaining the program:

- Continue delivery through Grey Agricultural Services
- Explore additional funding sources
- Focus funding on projects with strong knowledge-sharing potential

8. Compliance and Regulatory Review

Regulatory Requirements: None specifically requiring the program

Compliance Status: The program aligns with municipal policies and climate strategies.

Legal Implications: No direct legal implications if reduced or eliminated

9. Stakeholder Feedback

External/Community Input:

External feedback from participants indicates:

- strong satisfaction with the program experience
- improved confidence discussing climate issues
- increased teamwork and leadership skills
- stronger sense of community connection

Participants reported feeling empowered to participate in climate action and engage with community leaders.

Internal Feedback: N/A

10. Change Management

Change Management Strategy:

- If elimination were considered, staff would communicate program changes to youth participants and community partners

Stakeholder Engagement Plan:

- Project wind down would be communicated on social media channels.

Transition Plan: N/A

Municipal Program Assessment: County Forest Partial Delivery Model

Department/Division: County Forest Division

Executive Summary

An evaluation of potential cost-saving measures related to winter snowplowing and portable toilet services at the DCF Main Tract, and to assess their financial, operational, environmental, and public-use impacts.

The Forestry Division currently provides:

- Main Tract north parking lot snowplowing (\$13,200 annually)
- Two portable toilet rentals (one year-round, one seasonal) (\$3,500 annually)
- Total annual cost for these services is \$16,700.

This review includes five options:

- **Option A – Maintain Existing Services (Status Quo)**
 - Maintains year-round public access and winter recreation.
 - Provides essential sanitation for daily users and organized events.
 - Supports may multi-day equestrian camping events annually.
 - Prevents environmental degradation from unmanaged human waste.
 - Aligns with documented year-round use and County strategic priorities.
 - Overall value: HighBudget Savings: None
- **Option B – Eliminate Portable Toilets Only.**
 - Loss of public restroom access at a high-use site.
 - Increased environmental and public health risks.
 - Reduced accessibility for seniors, families, and organized user groups.
 - Cost transfer to user groups (event-based rentals are more expensive).
 - Overall Value: LowBudget Savings: \$3,500
- **Option C – Eliminate Snowplowing Only.**
 - Loss of winter parking access and reduced winter recreation use.
 - Conflicts with confirmed year-round demand.
 - Snowplowing service is bundled within a County-wide contract, limiting cost-effective alternatives.
 - Overall Value: ModerateBudget Savings: \$13,200
- **Option D – Eliminate Snowplowing & Portable Toilets**

- Converts Main Tract from year-round to limited-season use.
 - Significant decline in accessibility, user experience, and site safety.
 - Increased sanitation and environmental risks.
 - Overall Value: Low
- Budget Savings: \$16,700

- **Option E – Event-Based Portable Toilets (User-Paid Model)**

Impacts:

- Higher cumulative costs for user groups.
- No restroom access for general users outside events.
- Equity and partnership concerns.
- Overall Value: Low

Budget Savings: Up to \$3,500 (costs shifted, not eliminated)

Department Recommendation:

Proceed with Option A – Maintaining Existing Services. Eliminating snowplowing and/or portable toilet services generates modest financial savings while causing disproportionately negative impacts on accessibility, environmental protection, user experience, and community relationships. Maintaining existing services at the DCF Main Tract offers the highest overall value, preserves year-round public access, and protects the County’s investment in its flagship forest and trail infrastructure.

1. Current Program Overview

Program Name: County Forest Service Delivery.

Department/Division: Department of Public Works – Forest Division

Legislative Mandate:

Forestry Act, R.S.O. 1990:

Forestry purposes only

(3) A conservation authority or municipality that has entered into an agreement under subsection (1) or a predecessor provision shall not, without the approval of the Minister, use any land in respect of which grants have been made under subsection (2) or a predecessor provision for any purpose that is inconsistent with forestry purposes at any time during or after the term of the agreement. 1998, c. 18, Sched. I, s. 20.

Dufferin Bylaw 2017-39: “Being a By-Law to govern the lands known as the Dufferin County Forest and the Dufferin Rail Trail.”

Weed Control Act, R.S.O. 1990: Appointment of inspectors

6 (1) The council of every upper-tier and single-tier municipality shall, through by-law, appoint one or more people as area weed inspectors to enforce this Act in the area within the council’s

jurisdiction and fix their remuneration or other compensation. R.S.O. 1990, c. W.5, s. 6 (1); 2002, c. 17, Sched. F, Table.

Program Description:

- Preserving the ecological value of the Dufferin County Forest (DCF) by monitoring forest health, planning harvesting, and silviculture, controlling invasive species, and maintaining forest certification.
- Facilitating recreational use of the DCF & Rail Trail: Issuing Forest Use and Hunting Permits, mitigating conflicts between user groups, monitoring and maintenance of trails and forest access roads, maintenance of signage, managing DORAT (Dufferin Outdoor Recreation Advisory Team) and responding to public inquiries.
- Performing inspection services for the Weed Control Programs for seven municipalities and the County of Dufferin in accordance with the *Weed Control Act, 1990*.

Goals and Objectives:

- The goal of the DCF Management Plan: *"To protect the quality and integrity of ecosystems in the DCF, including air, water, land, and biota; and where quality and integrity have been diminished, to encourage restoration or remediation to healthy conditions; while providing a variety of social and economic benefits to the public."* DCF Management Plan 2016-2036
- *"The Council of the Corporation of the County of Dufferin hereby declares the use of the lands known as the Dufferin County Forests to be for "forestry purposes", that is to include the production of wood and wood products, provision of proper environmental conditions for wildlife, protection against floods and erosion, recreation, and protection and production of water supplies"* Dufferin County Forest Bylaw 2017-39.
- Corporate Strategic Plan 2023-2026, Priority: Climate & Environment
 1. Establish the County as a leader in climate action:
 - Creation and support for programs that increase climate resilience in agriculture and natural systems.
 2. We will enhance and conserve Dufferin's natural environment:
 - Increase collaboration with community groups, NGOs, businesses, and other orders of government to develop and implement conservation initiatives and programs.
 - Encourage community awareness and participation in programs implemented by the Conservation Authority, Province of Ontario, and County of Dufferin (e.g., Rural Water Quality, Experimental Acres, and tree planting programs) to support protection and enhancement of our natural environment.
 - Improve active transportation options and County trail infrastructure.

Strengths:

- \$125,000 / year average timber sales 1995-2025 (adjusted using the CPI - Consumer Price Index. *Current Value = Past Price x [Current CPI/Past CPI]*).

- The DCF & Rail Trail is a popular destination for year-round outdoor recreation activity: hiking, biking, x-country skiing, equestrian, ATV and motorcycle (Rail Trail only), snowmobiling, hunting, dog walking, enjoyed by both residents of and visitors to Dufferin County.
- Volunteer events support and augment the effort of the Division: Friends of the Dufferin County Forest clean-up events, invasive species pulls, user groups assisting with maintenance, contractors assisting with hazard tree removal.
- Invasive species grant applications have increased treatment capacity: \$2,500 in 2025, \$3,500 in 2026. The DCF had 33 hectares treated for invasives in 2025.

Weaknesses:

An area of improvement could be increasing the volume of project work that the Forestry Division undertakes, which adds value and increases user experience. Examples include rehabilitating (re-greening) the Rail Trail, Fire Smarting the DCF against the risk of forest fire and building accessible trail infrastructure.

Current Delivery Method:

- The Forest Division conducts its entire program with two and one-third employees (two FTEs and 1 summer student) and minimal admin support.
- Services contracted out – Tree marking (approx. \$3,500/year), portable toilet rental (approx. \$3,500/year), invasive species herbicide application (approx. \$3,000/year), snow removal (\$13,200/year).
- A variety of user groups (OFSC Snowmobile clubs [Orangeville, Aliston, Grand Valley], Equestrian Clubs [OCTRA, OTRA, CSC,] Mansfield Outdoor Centre, mountain bike riders [Team VanGo]) handle much of the trail maintenance through “in-kind” contributions.

2. Potential Changes

Describe areas under consideration:

Portable toilets: The Forestry Division also has a budget of \$3,500 for two portable chemical toilet rentals at the Main Tract. One is there year-round, in the snow-plowed portion of the parking lot, the other is only there seasonally from May to October, in the “Field Parking” area. It is unlikely that the Forest Division could provide a more economical version of this service on its own, as it currently only costs \$175 per toilet in monthly rental and cleaning fees. It could be possible to build permanent outdoor toilets; however, the upfront investment in the infrastructure, the maintenance costs, the risk of vandalism, and the cleaning effort, would not bring forth significant enough savings in providing an objectively less desirable option. There currently is not any electricity, running water, or buildings at that location, and therefore portable chemical toilet rentals have been providing the most cost effective, safe, and sanitary solution to satisfy the need for public restrooms at the Main Tract. It is not really an option to not provide public restrooms at that property. There currently are 75 days of horse camping and several other recreational events booked, in addition to many regular visitors to the

property.

Snow Removal: The Forestry Division currently budgets \$13,200 annually for snow removal at the Main Tract. This service is part of a Facilities Division tender covering winter parking lot maintenance for 16 County properties, with Femar Paving Ltd as the current contractor. It is unlikely the Forestry Division could secure this service at lower cost. While seasonal closure of the parking lot is an option, the Main Tract is a popular destination for year-round recreation, and maintaining winter access provides ongoing value.

3. Key Performance Indicators (KPIs)

Current KPIs:

- A. Area treated for invasive species
- B. Area of timber harvested in DCF.

Impact on KPIs:

- A. A reduction of staff in the Forest Division would eliminate the invasive species management initiative. The creation of the Forest Assistant position in 2022 spawned DCF invasive management efforts, as the DCF Manager position alone does not have the capacity to include those efforts into their workload, and therefore a negative impact on the long-term health of the Dufferin County Forest would occur upon removal of this KPI.
- B. Area of timber harvested should be unaffected if harvest plans continue to follow directives set out in the Forest Management and Operation Plans. The harvest modeling associated with the 2014 forest inventory projected sustainable harvest levels of 30-40 hectares a year for the next forty years, from 2014-2053.

Data Collection Methods:

- The Forest Assistant created a comprehensive Invasive Species Management Plan for the DCF in 2023, outlining both monitoring and management strategies. Annual surveying occurs for treatment effectiveness monitoring, gauging the spread of known infestations, and looking for new populations.
- Forest Resource Inventory (FRI) assessments occur regularly conducted, along with pre- and post-harvest operation assessments on an “as needed” basis.

Baseline Data:

- There is no baseline data for invasive species removal, as that part program did not exist prior to its implementation in 2022/2023. Thirty-three hectares of the DCF received invasive species treatment in 2025 and have been trending towards incremental increases over time.
- From 1995-2024, the average annual harvest was 33.8 ha in size, and the average annual revenue was \$125,000 (adjusted using the CPI).

4. Budget and Financial Analysis

Current Budget Breakdown:

- Personnel Costs:
 - n/a
- Operating Expenses:
 - n/a
- Contract Services:
 - Snow clearing, \$13,200
 - Portable toilet rentals, \$3,500
- Capital Expenditure:
 - n/a

Projected Savings:

- Eliminating parking lot snowplowing and porta-potty rentals from the Main Tract would result in savings of \$16,700.

Cost-Benefit Analysis: Main Tract Snowplowing and Portable Toilet Services

This analysis evaluates potential cost-saving measures related to winter snowplowing and portable toilet rentals at the Dufferin County Forest (DCF) Main Tract against their financial, operational, and user-experience impacts.

Options Considered

Option A - Status Quo – Maintain snowplowing and portable toilet services.

Option B - Eliminate Portable Toilets Only.

Option C - Eliminate Snowplowing Only.

Option D - Eliminate Snowplowing and Portable Toilets.

Option E - Event-Based Portable Toilet Rentals (User-Paid).

Option A. Status Quo – Maintain Existing Services

Costs:

- Portable toilet rentals: \$3,500 annually
- Snowplowing (parking lot): \$13,200 annually
- Total annual cost: \$16,700

Benefits:

- Supports year-round recreation at the most heavily used forest tract.
- Maintains accessibility during winter months.
- Provides essential sanitation for daily users and organized events.

- Supports thirteen multi-day equestrian camping events annually.
- Avoids environmental degradation from unmanaged human waste.
- Aligns with surveys showing 12-month demand and daily winter users.

Net Assessment:

- While costs are ongoing, services are essential to maintaining access, safety, and user satisfaction at the County's flagship forest property.

Option B. Eliminate Portable Toilets Only

Cost Savings: Annual savings of \$3,500.

Costs / Negative Impacts:

- Loss of public restroom access at a high-use site
- Increased risk of unsanitary conditions and environmental impacts
- Reduced accessibility for seniors, families, and organized user groups
- Thirteen multi-day equestrian camping events would be affected

Cost Shift: Event-based rentals required for equestrian groups.

- Estimated \$2,275 for 13 individual rentals, compared to the current, \$875 for a five-month seasonal rental (Field Parking area only).
- Transfers cost burden to volunteers and user groups.

Net Assessment

- Minimal net fiscal benefit to the County, with disproportionate negative impacts on user experience, equity of access, and partner relationships.

Option C. Eliminate Snowplowing Only

Cost Savings: Annual savings of \$13,200

Costs / Negative Impacts:

- Loss of winter access to the Main Tract parking lot.
- Contradicts survey data confirming year-round use.
- Reduces accessibility for snowshoeing, skiing, hiking, and dog walking.
- Potential displacement of users to less suitable access points.

Operational Considerations:

- Service is bundled within a County-wide Facilities Division contract.
- Forestry Division unlikely to secure a lower cost service independently.

Net Assessment:

- Moderate fiscal savings, but significant reduction in public access, especially during winter months when alternative options are limited.

Option D. Eliminate Snowplowing and Portable Toilets

Cost Savings: \$16,700 annually

Costs / Negative Impacts:

- Converts the Main Tract from a year-round to a limited-season site.
- Significantly degrades visitor experience and accessibility.
- Increased risk of unmanaged sanitation impacts.

- Undermines County investment in recreation and active transportation.
- Weak return relative to the scale of negative impacts.

Net Assessment:

- This option delivers the maximum cost savings but also the greatest service reduction, negatively affecting the perception, usability, and safety of the Dufferin County Forest.

Option E. Event-Based Portable Toilets (User-Paid Model)

Cost Savings: Up to \$3,500 annually for the County

Costs / Negative Impacts:

- Higher cumulative costs to user groups (\$2,275 vs. \$875).
- Loss of restroom access for general users between events.
- Increased administrative coordination.
- Reduced equity by shifting core infrastructure costs to not-for-profit recreational user groups.

Net Assessment:

- Does not result in meaningful net savings at the system level and weakens long-standing partnerships with user groups who provide in-kind support.

Table 1: Cost Benefit Analysis Summary Table

Option	Annual County Savings	User / Operational Impact	Overall Value
A. Status Quo	\$0	High access, high satisfaction	High
B. Eliminate Toilets	\$3,500	Moderate–high negative impact	Low
C. Eliminate-Snowplowing	\$13,200	High winter access loss	Moderate
D. Eliminate Both	\$16,700	Severe service reduction	Low
E. Event-Based Toilets	\$3,500 (shifted)	Cost transfer, equity issues	Low

Conclusion

The cost–benefit analysis demonstrates that eliminating snowplowing and/or portable toilet services produces relatively modest fiscal savings while generating disproportionate negative impacts on usability, accessibility, environmental protection, and public satisfaction. Maintaining these services represents a high-value investment in the County’s most intensively used forest property and is consistent with survey data, program goals, and strategic priorities

Support Costs: None.

5. Service Delivery Impact

Updated Service:

Improving project management and conducting project-based work in the Dufferin County Forest.

Revised Goals and Objectives:

Identifying areas where project work adds value. Examples include rehabilitation and re-greening of the Rail Trail, "Fire Smarting" the most at risk areas of the DCF and building accessible trail infrastructure at the Main and Mono Tracts.

New Service Delivery Model:

Depending on scope and expense of each project, it will only be feasible to undertake one project at time due to staffing and budget constraints. Staff and volunteer labor would conduct all project work "in-house," except in unique circumstances requiring the use of specialized equipment.

Impact on Service Recipients:

An increased focus on project-based work in the Dufferin County Forest would help to improve the user experience: Greening up the Rail Trail would create a more aesthetically pleasing and functional environment, as the planted trees would provide shade and snow drift protection. "Fire Smarting" the most susceptible and at-risk areas of the DCF would help to protect the properties and provide a safer recreational environment, and creating accessible trails would expand recreational use to an underserved demographic.

Access and Equity Considerations:

- The dominant forest recreation user demographic are middle-aged white males (mountain bike trail riders); improvements made through project-based work should hopefully help diversification.
- The target population would be middle-aged/retirement aged adult men and women using the DCF for forest recreation (hiking, dog-walking, biking, skiing, hunting) activities. User groups in the DCF are: three different equestrian clubs, three different snowmobile clubs, two different bicycling organizations, a running race organization, an orienteering club, a mycology club, two separate cadet units, an Indigenous cultural group, and the Dufferin County Search & Rescue association.

Quality Assurance Measures:

An added focus on project-based work would place limits on the size, scope, and timeline of projects undertaken, to not exceed staff capacity for maintaining current service levels.

6. Impact Analysis

- **Alignment with Strategic Goals:**

- 2. *We will enhance and conserve Dufferin's natural environment.*

- *Improve active transportation options and County Trail infrastructure.*

- **Positive Impacts:**

Creating value-based improvements in a timely fashion through project management.

- **Negative Impacts:**

Adding project work could take away from regular operations and lower service levels if not managed properly.

7. Risk Assessment

- **Identified Risks:**

Project work is expensive and not currently within the Forest Division budget.

- **Mitigation Strategies:**

Thorough project management planning, well-scoped proposals, detailed budgets, creative solutions, and professionally written grant funding applications.

8. Compliance and Regulatory Review

- **Regulatory Requirements:**

- *Forestry Act, R.S.O. 1990; Dufferin Bylaw 2017-39; Weed Control Act, R.S.O. 1990.*
- *Planning Act R.S.O. 1990; Niagara Escarpment Planning and Development Act, R.S.O. 1990; O. Reg. 140/02: Oak Ridges Moraine Conservation Plan.*

Table 2: High Conservation Value (HCV) Forests in the Dufferin County Forest

Tract (Compartments)	Area (Hectares)	Conservation Value
Amaranth (42a) Laurel Wetland	12	Prov. Sig. Wetland (PSW)
Amaranth (43b, 43c), F. Swamp	10	Locally Significant Wetland
Hockley, Orangeville Wetland	20	Prov. Sig. Wetland (PSW)
Leening	8	Niagara Escarp. Rural Area
Levitt	4	Niagara Escarp. Natural Area
Little	44	Developing Old Growth
Main (11, 20a, 21a, 21b, 23c, 24a, 25a, 26-30, 31a, 31d), Oak Ridges	266	Life Science ANSI
Main (31b, 31c)	24	Locally Significant Wetland
Melancthon (33a, 33c, 33d, 34d, 34a, 35a) Melancthon 1	48	Prov. Sig. Wetland (PSW)
Randwick (4d) Walker's Creek Wetland	2	Locally Significant Wetland
Riverview (37a, 38c, 38d), Melancthon 2	13	Locally Significant Wetland
Total	451	

Table 1 identifies protected High Conservation Value (HCV) areas within the Dufferin County Forest. These ecologically and culturally significant sites are subject to provincial regulatory protection, with eight properties also designated under Nature Conservancy's 30×30 initiative. Collectively, HCV areas comprise 42% of the total forest area.

- **Compliance Status:**

The 2025 Sustainable Forest Initiative Audit (SFI) forest certification audit conducted by James Hallworth from Preferred by Nature on October 22nd, 2025, verified that the DCF met all certification requirements.

- **Legal Implications:**

The Forest Division is currently responsible for enforcing the Noxious Weed Act within Dufferin County, which is a legislated obligation.

9. Stakeholder Feedback

- **External/Community Input:**

Members of the DORAT (Dufferin Outdoor Recreation Advisory Team) attended a virtual meeting on March 17th and took part in a discussion of key points from the Municipal Program Review. The information received so far validated that there is need for an accessible trail network in the DCF.

- **Internal Feedback:**

The Director of Public Works indicated that project management is a deficiency throughout the organization and requires improvement.

10. Change Management

- **Change Management Strategy:**

Ideally, there will not be any reductions and/or eliminations to the Forest Division program, but if something should occur, there will be direct contact with the impacted group(s) and individuals.

- **Stakeholder Engagement Plan:**

Either through direct communication or the Dufferin Outdoor Recreation Advisory Team (DORAT).

- **Transition Plan:**

This would need to be an ad-hoc process specifically tailored to the moment.

**Municipal Program Assessment:
County Forest Revenues & Private Sponsorships**

Department/Division: County Forest

Executive Summary

The Forest Division's financial model remains heavily reliant on timber sales as its primary and most reliable revenue source, generating \$134,934 in total actual revenue in 2025 against \$383,000 in operating expenditures, reinforcing that revenues are intended to partially offset costs rather than fully recover them. While non-timber revenues such as forest user permits, land-use agreements, and invasive species grants provide useful operational support, they remain modest in scale and do not significantly reduce dependency on harvesting activities. Legislative constraints further limit opportunities for revenue diversification beyond forestry-aligned and cost-recovery activities. A cost-benefit analysis of supplementary revenue options confirms that no alternative can meaningfully replace timber revenues; however, select initiatives, particularly grant funding, may deliver incremental benefits when pursued cautiously and in alignment with forestry objectives.

This review includes four additional revenue options:

- **Option A - Additional Grant Funding**
Grant funding offers the strongest alignment with the Forest Division's mandate, supporting initiatives such as invasive species management, trail accessibility, certification compliance, and student employment. While funding is competitive and non-guaranteed, it provides clear program value. The primary limitation is the administrative workload associated with applications, reporting, and financial tracking.
Estimated Revenue Increase: \$5,000–\$15,000 (project-specific)
- **Option B - Limited Onsite Advertising (Main Tract)**
Controlled onsite advertising could provide incremental revenue; however, this option carries aesthetic concerns, public sensitivity, vandalism risk, and ongoing maintenance responsibilities. Financial returns are modest relative to reputational and operational impacts.
Estimated Revenue Increase: \$3,000–\$8,000
- **Option C - Increased User Fees**
User fees are restricted by legislation to cost recovery. Even with substantial increases, revenues would remain limited and may generate public dissatisfaction without producing meaningful financial gains.
Budget savings: Revenue Increase - \$3,000–\$6,000
- **Option D - Communications Infrastructure Leasing**

Leasing land for communications infrastructure presents a potentially higher single-source revenue option but involves significant political, reputational, and approval risks. Historical precedent indicates limited support for this approach, and financial outcomes are not assured.

Budget savings: Revenue Increase - \$5,000–\$10,000

Recommendation:

Proceed with Option A – Additional Grand Funding. The analysis confirms that timber sales will remain the Forest Division’s primary revenue source. Supplementary revenue opportunities can enhance financial resilience and program capacity but only at a modest scale. Grant funding represents the most prudent and strategically aligned option, while other measures offer limited returns and higher risk. A cautious, selective approach to revenue diversification, focused on grants and forestry-compatible partnerships, best supports long-term stewardship objectives, public trust, and operational stability. Additional revenue - \$5,000-\$15,000.

1. Current Program Overview

Program Name: Investigation of additional revenue streams.

Department/Division: Department of Public Works – Forest Division

Legislative Mandate:

o Forestry Act, R.S.O. 1990:

Forestry purposes only:

(3) A conservation authority or municipality that has entered into an agreement under subsection (1) or a predecessor provision shall not, without the approval of the Minister, use any land in respect of which grants have been made under subsection (2) or a predecessor provision for any purpose that is inconsistent with forestry purposes at any time during or after the term of the agreement. 1998, c. 18, Sched. I, s. 20.

The declaration of the *Forestry Act* that the County shall use the DCF for forestry purposes only, directs the Forest Division to earn revenue from timber sales.

o Municipal Act, S.O. 2001:

Service fees cannot generate profit; they cannot exceed the total cost of providing the service or activity.

Program Description:

The Forest Division accumulates revenue from these sources:

- A. Annual Timber Sales.
- B. Forest User Permits.
- C. Grant Funding Applications.
- A. Annual Timber Sales:

The thirty-year average of annual timber sales for the Dufferin County Forest is \$125,000 (adjusted using the Consumer Price Index. Current Value = Past Price x

[Current Price Index / Past Price Index]). Variables that impact the amount of revenue earned in a timber sale are open-market price fluctuations, the size, species, and quality of the harvested trees, and the total volume of timber available for sale. The DCF Management Plan used a computer model to calculate a maximum annual area allocation of 30-40 hectares/year to sustainably harvest in perpetuity, which indicates that it is not advisable to pursue increased revenue from an expansion of timber sales.

B. Forest User Permits:

The Forestry Division charges nominal fees to individuals and groups wishing to use the DCF for certain recreational events and activities:

- Event permit fee is \$50, plus an additional \$2 per person.
- DCF seasonal Hunting Permits are \$30.
- Land Use Agreement with the Mansfield Outdoors Centre, for cross-country ski trails in the Main Tract. The fee scales are based on cumulative users: Fewer than 1000 users is \$820, 1000-3000 users are \$1,148, and >3000 is \$1,640

In 2025, the total revenue received from County Forest Event Permits, County Forest Event Per Person Fees, Hunting Permit sales, and the Land Use Agreement with the Mansfield Outdoor Centre was \$5,832. Increasing the amount charged for events and permits is an option; however, even doubling the current fees would not result in a substantial gain in revenue.

C. Invasive Species Centre Grants:

Successful grant applications have increased treatment capacity: \$2,500 in 2024, \$3,500 in 2025. Thirty-three total hectares of DCF Invasive species treatment in 2025. In 2026, grant applications have been submitted for \$7,000 to the Invasive Phragmites Control Fund, and for \$9,719 to the Invasive Species Action fund, but those results have yet to be announced.

Goals and Objectives:

The objective of the Forest Division in the pursuit of external revenue is to offset operating expenses, and not fund the entire Division, through timber sales, recreational user fees, and grant applications.

Strengths:

- High value tree species and timber products (red pine and utility poles) have provided a history of competitive and lucrative timber sales.
- 75 days (so far) of recreational events booked for 2026.
- The addition of Public Works Administration staff to assist with the issuing of event and hunting permits has improved efficiency and service.
- The payment of permits transitioning from the Museum of Dufferin's Shopify account to the County's, which initially resulted in frustration and confusion for regular customers, has helped to streamline the permitting process.

Weaknesses:

An area of improvement could be that staff need to put more effort into pursuing external sponsorship opportunities and submitting grant applications.

Current Delivery Method:

The revenue generated by the Forest Division currently comes from timber sales and regular business practices and does not rely on external sponsorship.

2. Potential Changes

Describe areas under consideration.

- Increase revenue through billboard advertising, which is not possible in a county right-of-way, but may be possible inside the parking lot.
- Increase revenue through additional grant applications. There are grants available through the SFI Certification that can help cover student wages
- Increase user fees (Forest Permit Fees), currently \$50/permit and \$2/per user, and \$30/season for Hunting Permits.
- Increase revenue through leasing space for communications infrastructure, if available. In August of 2004, the Dufferin County Museum & Archives and Heritage Lands Board voted *against* a recommendation from the County Forester to lease land for \$6,000/year for a cell tower on DCF property.

3. Key Performance Indicators (KPIs)

Current KPIs:

- A. Area treated for invasive species
- B. Area of timber harvested in DCF

Impact on KPIs:

- A. The combined total of \$6000 in grant money from the Invasive Species Centre in 2024 and 2025 has helped expand the capacity of this KPI beyond the Division's normal operational efforts.
- B. The directives from the area-based timber harvest model, as set out in the Forest Management and Operation Plans, project sustainable timber harvest levels of 30-40 hectares a year for the next forty years, from 2014-2053. It is difficult to negatively impact total area harvested as a KPI.

Data Collection Methods:

- In 2023, the Forest Division developed a comprehensive Invasive Species Management Plan, outlining both monitoring and management strategies. Annual surveying occurs for treatment effectiveness monitoring, gauging the spread of known infestations, and looking for new populations of invasives.
- Regular scheduled Forest Resource Inventory (FRI) measurements, pre- and post-harvest operation surveys, and forest health assessments, to validate and work within what was

determined by the harvest model.

- Forest user survey data gathered quarterly in 2023 and 2024 to collect information concerning activities, economic, demographic, and seasonal use data from visitors to the Main Tract.

Baseline Data:

- There is no baseline data for invasive species removal, as that part program did not exist prior to its implementation in 2022/2023. Thirty-three hectares of the DCF received invasive species treatment in 2025 and have been trending towards incremental increases over time.
- From 1995-2024, the average annual harvest was 33.8 ha in size, and the average annual revenue was \$85,132.87.

4. Budget and Financial Analysis

Current Budget Breakdown:

Existing Revenue (Budget)

- Timber Sales: \$50,000
- Land Use Permits: \$3,000
- Hunting Permits: \$3,000

2025 Existing Revenue (Budget) Total: \$58,500

Existing Revenue: Timber Sales

- 2025 Timber Sales: \$124,783
- 2024 Timber Sales: \$261,107
- 29 Year Average (1995-2025): \$125,194.27¹
- ¹Excludes 2019 & 2020 with cancelled sales for \$0 revenue and adjusted using the Consumer Price Index (CPI).

Total Timber Sales Revenue 2025: \$124,783

Existing Revenue: Forest Use Permits:

- 2025 County Forest Event Application Fee: \$2,340
- 2025 County Forest Event Per Person Fee: \$1,845
- 2025 County Forest Hunting Permits: \$1,646
- 2025 County Forest Land Use Permit: \$820

Total Forest Use Permit Revenue 2025: \$6,651

Existing Revenue: Invasive Species Centre Grants

- 2024 Invasive Species Grant: \$2500
- **2025 Invasive Species Grant: \$3500**

2025 Existing Revenue (Actual) Total: \$134,934

Projected Savings:

Not Applicable – the objective is to pursue funding; however, through the pursuit of program

specific grant funding, it will be possible to carry out project work and augment operations with minimal impact to the budget.

Cost-Benefit Analysis:

The Forest Division evaluated potential supplementary revenue options against their anticipated financial benefit, administrative cost, operational impact, and public sensitivity. The analysis confirms that while none of the options materially reduce reliance on timber sales, select initiatives may provide modest net financial and programmatic benefits when implemented cautiously.

Table 1: Cost-Benefit Analysis Summary Assessment

Revenue Option	Estimated Annual Benefit	Direct & Indirect Costs	Net Benefit	Key Considerations
Additional Grant Funding	\$5,000-\$15,000 (project-specific)	High staff and finance time for applications, reporting, audits	Moderate-Positive	Best alignment with forestry mandate; funding not guaranteed
Limited On-site Advertising (Main Tract)	\$3,000-\$8,000	Sign installation, maintenance, staff time, vandalism risk	Low-Moderate	High public sensitivity; limited locations
Increased User Fees	\$3,000-\$6,000	Minimal administrative cost	Low	Fees constrained by Municipal Act; modest revenue ceiling
Communications Infrastructure Lease	\$5,000-\$10,000	Negotiation, ongoing monitoring, reputational risk	Uncertain	Requires political approval; prior precedent indicates resistance

Benefits

- Operating Cost Offsets:
Supplemental revenue can help offset operating expenses without expanding harvest levels or reducing services.
- Enhanced Program Capacity:
Grant funding enables project-specific work (e.g., invasive species control, accessible trail development, student employment) that would not otherwise be achievable within existing

budgets.

- Service Quality Improvements:

Targeted funding may allow incremental improvements to recreational infrastructure, forest health initiatives, and public access.

- Revenue Diversification:

Reduces reliance on timber sales as the primary funding source.

Costs and Limitations

- Administrative Burden:

Grant funding is time-intensive, requiring staff and Finance Department involvement for application preparation, compliance, tracking, and reporting.

- Financial Uncertainty:

Grant outcomes are competitive and unpredictable; projected revenue cannot be relied upon annually.

- Public and Reputational Risk:

Advertising or leasing arrangements may generate public concern related to commercialization of County Forest lands.

- Legislative Constraints:

User fees cannot exceed the cost-of-service delivery, significantly limiting net revenue potential under the Municipal Act.

- Opportunity Cost:

Time spent pursuing low-yield revenue sources may detract from core operational and stewardship priorities.

Net Impact

- Grant funding offers the highest net benefit, despite administrative costs, due to strong alignment with forestry objectives, certification requirements, and community expectations.
- User fee increases and advertising provide limited financial return relative to potential public concern and administrative effort.
- Land-use leasing presents potential revenue but carries higher political, approval, and reputational risk.

Accordingly, the Forest Division is best positioned to pursue grant-based and partnership-oriented funding opportunistically, while exercising caution with initiatives that may compromise public trust, aesthetic values, or staff capacity.

Support Costs:

Minimal – Finance Department for grant application processing, Purchasing Division to administer timber sales and potential advertising sales for a billboard.

5. Service Delivery Impact

- **Updated Service:**

The intention is to maintain or even augment existing services levels through additional

external revenue sources and not reduce or eliminate any activities undertaken by the Forest Division.

- **Revised Goals and Objectives:**

Pursue opportunities for external funding and be diligent with researching and applying for grant opportunities whenever they become available.

- **New Service Delivery Model:**

- Placing a billboard at the Main Tract and procuring advertisements.
- Investing time and effort into researching and applying for funding grants.
- Searching for additional land use and/or lease agreements

- **Impact on Service Recipients:**

Ideally, increasing revenue would improve the service model; however, installing a billboard for advertisements at the Main Tract may generate complaints from regular visitors to that property.

- **Access and Equity Considerations:**

Pursuing additional grant funding may be beneficial for access and equity as it could provide resources to facilitate the development of accessible trails and infrastructure.

Quality Assurance Measures:

Carefully vetting billboard advertisements to ensure they do not display or represent anything that would put the County or the community at risk.

6. Impact Analysis

- **Alignment with Strategic Goals:**

The pursuit of additional funding supports the Dufferin County Strategic Plan:

2. *We will enhance and conserve Dufferin's natural environment.*

- *Improve active transportation options and County Trail infrastructure.*

- **Positive Impacts:**

Receiving additional funding targeted at specific project-based work, such as building accessible trails, fire-smarting the DCF, and re-greening the Rail Trail corridor, will add value and improve user experience.

- **Negative Impacts:**

- A billboard at the Main Tract will reduce natural aesthetics, be a target for vandalism, and create the perception that the DCF is "For Sale."
- Applying for grant funding is tedious and time consuming, and often unsuccessful.
- Regular visitors to the DCF may not react positively to increasing fees.

7. Risk Assessment

- **Identified Risks:**

The initiative fails, with no additional funding opportunities developed.

- **Mitigation Strategies:**

- Take a realistic yet tenacious approach to grant applications.

- Approach local businesses and organizations whose directives and values align with that of the DCF and would be interested in advertising there.

8. Compliance and Regulatory Review

- **Regulatory Requirements:**

- The Corporation of the Township of Mulmur By-Law NO. 09 – 2022, Being a by-law regulating signs and any other advertising devices within the Township of Mulmur.
- Dufferin County Transportation Services Policy 5-6-5, To control the placing of private advertising signs on County Road allowances.

- **Compliance Status:**

The 2025 Sustainable Forest Initiative Audit (SFI) forest certification audit conducted by James Hallworth from Preferred by Nature on October 22nd, 2025, verified that the DCF met all certification requirements.

- **Legal Implications:**

None identified at this time.

9. Stakeholder Feedback

- **External/Community Input:**

Members of the DORAT (Dufferin Outdoor Recreation Advisory Team) attended a virtual meeting on March 17th and took part in a discussion of key points from the Municipal Program Review. The information received so far validated that there is need for an accessible trail network in the DCF.

- **Internal Feedback:**

No objections to the strategies outlined in this document.

10. Change Management

- **Change Management Strategy:** Ideally, there will not be any reductions and/or eliminations to the Forest Division program, but if something should occur, there will be direct contact with the impacted group(s) and individuals.
- **Stakeholder Engagement Plan:** Either through direct communication or the Dufferin Outdoor Recreation Advisory Team (DORAT).
- **Transition Plan:** This would need to be an ad-hoc process specifically tailored to the moment.

Municipal Program Assessment: Development Review – Hybrid Model

Department/Division: Engineering Division

Executive Summary

The Development Engineering Review program ensures that new developments progress in such a way that they do not negatively impact County transportation infrastructure and that growth is coordinated with long-term infrastructure planning. Engineering staff review development applications to assess traffic impacts, access to County roads, corridor protection, and infrastructure upgrades required because of development. This review process helps protect County assets while supporting safe and coordinated growth across the County.

As part of the Municipal Program Review, this program was assessed to ensure it remains efficient, sustainable, and aligned with current service demands. The review was undertaken in support of the corporate objective to maintain service levels while ensuring responsible financial management.

The evaluation considered key performance indicators including review turnaround time, cost per application, infrastructure protection, institutional knowledge retention, organizational capacity, and financial flexibility.

Three service delivery models were evaluated:

- **Option A – Primarily Internal (Approved Staffing Model – 2 Staff)**
Reference point for savings comparisons
Budget Savings: None, annual program cost \$167,300
- **Option B – Hybrid (1 Staff Supported by External Consultants)**
Budget savings are achieved by eliminating the second approved position (currently vacant) while maintaining service levels through scalable, partially cost-recoverable consultant support.
Budget Savings: \$72,100
- **Option C – Fully External (Consultant based)**
Budget Savings: None. Budget increase vs Option A

While Option A performs strongly across several operational indicators, it reflects a two-position staffing structure that is not aligned with current workload levels and introduces unnecessary fixed costs under current conditions.

Option C was determined to be less favorable due to higher overall costs, increased reliance on external consultants, reduced internal control over review timelines, and diminished retention of institutional knowledge.

Recommendation:

Option B is recommended as the preferred approach. This model maintains one full-time internal staff resource to provide oversight, coordination, and continuity, while leveraging external consultants as required to support peak workloads and specialized technical reviews. This approach maintains internal expertise while introducing flexible, scalable support.

A key advantage of Option B is the use of cost-recoverable peer review services, allowing consultant costs associated with development applications to be partially or fully offset through existing by-laws. This reduces the net financial impact while maintaining service quality and responsiveness.

From a financial perspective, Option B is expected to generate annual savings of approximately \$72,100 when compared to Option A, by avoiding underutilized staffing costs while maintaining service levels through scalable consultant support.

From an operational perspective, Option B:

- Maintains strong internal oversight and institutional knowledge
- Aligns staffing resources with current workload demand
- Improves flexibility to respond to fluctuations in development activity
- Supports long-term sustainability of the program

Based on the findings of this review, it is recommended that the County: Adopt Option B – Hybrid service delivery

- Continue to defer filling the currently vacant support position
- Utilize cost-recoverable consultant support as required
- Monitor development application volumes and service levels
- Monitor how the redistributed 45% workload is absorbed within the Engineering team following the adoption of Option B and the transition to a single staff member.
- Reassess staffing requirements if sustained increases in workload occur

Overall, Option B provides a balanced, cost-effective, and flexible service delivery approach that aligns with current operational needs, supports corporate financial objectives, and maintains the County's ability to effectively manage growth and protect infrastructure.

1. Current Program Overview

Program Name: Development Engineering Review

Department/Division: Public Works/Engineering

Legislative Mandate (if applicable): N/A

Program Description:

Development Engineering Review ensures that development applications do not negatively impact County transportation infrastructure. Reviews address traffic impacts, access, corridor protection, required upgrades, and alignment with capital planning. The service is currently

delivered primarily by internal staff, with consultants supporting specialized reviews

Goals and Objectives:

Protect County infrastructure, ensure appropriate mitigation of development impacts, provide timely engineering review, and align development with long-term infrastructure planning.

Strengths:

Strong internal expertise, consistent review standards, efficient processing of routine applications, and alignment with capital planning.

Weaknesses:

Limited capacity during peak periods, reliance on consultants for specialized analysis, and potential workload pressures.

Current Delivery Method:

Direct service delivery by in-house engineering staff, supplemented by external peer reviewers for specialized technical matters.

2. Potential Changes

Describe areas under consideration

- Reducing or eliminating services/programs
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue (likely the most difficult)

The program review is considering whether adjustments to the current service delivery model could improve efficiency, financial sustainability and long-term program performance while maintaining service levels.

Three service delivery models are being evaluated:

Option A – Primarily Internal Review (Approved Staffing Model – 2 staff)

- Development review services delivered primarily by two full-time internal engineering staff:
 - Senior Development Reviewer
 - Development Reviewer (support position)
- External consultants engaged only for specialized technical reviews
- Internal management oversight maintained.

Key Consideration:

- The second support position, while approved by Council, has remained vacant and has not been required to meet current service demands based on 2025 workload levels.
- It is recognized that the vacant support position contributes approximately 55% of its

time to development review activities, with the remaining responsibilities supporting broader Engineering functions. As such, some redistribution of non-development responsibilities across the Engineering Team will be required, and workload impacts will need to be monitored.

- Despite being unfilled, this position represents a committed staffing model and associated budget pressure that must be considered in evaluating long-term service delivery options.

Summary:

- Strong internal control and institutional knowledge
- Higher fixed-cost structure
- Limited flexibility to adjust resources based on fluctuations in development activity.

Option B – Hybrid Model (1 staff supported by external consultants)

- Development review services delivered through a combination of:
 - One full-time internal staff resource, and
 - External consultants engaged as required.
- Internal staff responsible for:
 - File coordination and review oversight.
 - Application of County standards and policies
 - Final review and approval processes, when applicable
- External consultants engaged for:
 - Peak workload periods
 - Specialized technical reviews (e.g., traffic, servicing, modelling)
- Consultant services are partially or fully cost recoverable through development application fees in accordance with existing by-laws.

Key Considerations:

- Aligns staffing levels with current workload conditions.
- Reduces fixed staffing costs associated with underutilized capacity.
- Provides flexibility to scale resources based on demand.
- Maintains internal oversight and institutional knowledge.
- Supports financial sustainability through cost recovery mechanisms.

Summary:

- Balanced, flexible, and scalable service delivery model
- Strong alignment with both operational and financial objectives

Option C – Fully External Review

- Development review services conducted primarily by external consultants.
- Internal staff limited to:
 - Administrative coordination
 - Contract management

- Oversight functions
- Heavy reliance on consultants for all technical review components

Key Considerations:

- Increased exposure to market rates and consultant availability
- Reduced internal control over review timelines.
- Lower retention of institutional knowledge related to County infrastructure and standards.

Summary:

- High flexibility
- Higher and more variable costs
- Reduced internal capacity and control.

3. Key Performance Indicators (KPIs)

Current KPIs:

To evaluate the effectiveness of each service delivery model, a set of key performance indicators (KPIs) were used to compare service effectiveness, cost management, infrastructure protection, and organizational capacity.

These indicators reflect the primary objectives of the Development Engineering Review program:

1. Review Turnaround Time
2. Consultant Utilization Efficiency
3. Infrastructure Protection Effectiveness
4. Cost per Application
5. Cost Predictability & Financial Flexibility
6. Internal Review Completion Rate
7. Institutional Knowledge Retention
8. Strategic Alignment with County Infrastructure Planning
9. Organizational Capacity Resilience
10. Flexibility for Workload spikes

Impact on KPIs:

KPI Comparison Across Service Delivery Models

KPI	Option A	Option B	Option C
Review Turnaround Time	Good – routine reviews completed efficiently by internal staff	Good – internal reviews supported by consultants during peak periods	Moderate – dependent on consultant availability
Consultant	Low – consultants used	Moderate – consultants	High – most reviews

KPI	Option A	Option B	Option C
Utilization Effectiveness	only for specialized technical reviews	used strategically for complex files or workload spikes	completed by consultants
Infrastructure Protection Effectiveness	High – strong internal knowledge of County infrastructure and policies	High – internal knowledge supported by specialized expertise	Moderate – consultants may have less familiarity with County infrastructure and long-term planning priorities
Cost per Application	Moderate – higher fixed staffing cost impacts efficiency	Low – balanced use of internal and external resources	High – consultant fees applied to most applications
Cost Predictability & Financial Flexibility	Moderate – stable but inflexible fixed staffing cost, including vacant position	High – combination of stable base cost and scalable, cost-recoverable consultant support	Low – high exposure to market rates and variable consultant costs
Internal Review Completion Rate	High – majority of reviews completed internally	High – core reviews completed internally with support as needed	Low – limited internal review role
Institutional Knowledge Retention	High – internal expertise maintained within the organization	High – internal knowledge retained while consultants provide support	Low – knowledge largely externalized to consultants
Strategic Alignment with County Infrastructure Planning	High – strong internal integration with County standards, policies, and long-term infrastructure objectives	High – internal oversight maintained while consultants provide targeted support	Moderate – reduced internal connection to County planning priorities and long-term infrastructure objectives
Organizational Capacity Resilience	Moderate – strong internal capability, but less adaptable to workload fluctuations and reliant on full approved staffing complement	High – balanced internal oversight with flexible external support improves adaptability and resilience	Low – limited internal technical capacity and greater reliance on external providers
Flexibility for	Low – additional internal	High – consultant	High – external

KPI	Option A	Option B	Option C
workload spikes	capacity is fixed and may be underutilized during lower-volume periods	resources can be scaled up or down as workload demands change	resources can be expanded as needed, subject to consultant availability

Key Insight from a KPI performance perspective:

Option A - Primarily Internal

- Strong internal knowledge and infrastructure protection
- High internal completion rate
- Low consultant utilization
- Limited flexibility for workload spikes
- Higher fixed cost due to 2 full time staffing model

Option B - Hybrid

- Balanced performance across all KPIs
- Strong flexibility and scalability
- Maintains internal oversight and knowledge.
- Best alignment between service demand and resource / financial allocation

Option C - External

- Highest consultant cost
- Reduced institutional knowledge.
- Reduced internal control over timelines.

Below is a completed comparison chart that scores each service delivery model across the KPIs and key performance factors.

Scores use a 1–5 scale:

- 1 = Poor
- 2 = Below Average
- 3 = Acceptable
- 4 = Good
- 5 = Excellent

Development Review Service Delivery Model Comparison Chart

Performance Area / KPI	Option A	Option B	Option C
Review Turnaround Time	4	4	3
Consultant Utilization Efficiency	5	4	1
Infrastructure Protection Effectiveness	5	5	3

Performance Area / KPI	Option A	Option B	Option C
Cost per Application	3	5	1
Cost Predictability & Financial Flexibility	3	5	1
Internal Review Completion Rate	5	4	1
Institutional Knowledge Retention	5	5	2
Strategic Alignment with County Infrastructure Planning	5	5	3
Organizational Capacity & Resilience	4	5	2
Flexibility for Workload Spikes	3	5	5

Total Score

Option	Total Score	Average Score
Option A (Current)	42	4.2
Option B (Hybrid)	47	4.7
Option C (Fully External)	22	2.2

Conclusion

Both Option A and Option B perform significantly better than Option C. However, the evaluation concludes that Option B, maintaining strong internal development review capacity while selectively engaging consultants for specialized technical disciplines provides the best balance of cost efficiency, operational performance, and infrastructure protection..

- **Data Collection Methods:** (e.g., surveys, reports, monitoring systems)
- Application tracking systems
- Financial tracking systems
- Average consultant hourly rate, and general pricing from past consultant engagement.
- **Baseline Data:** Existing performance data before change.
- Existing departmental tracking of application volumes, timelines, and financial securities.

4. Budget and Financial Analysis

Current Budget Breakdown (Represents Option A):

- One Senior full-time position - Senior Development Reviewer (approx. 45% technical review,

20% project management, 15% operational oversight, balance in standards, leadership, and finance), \$149,500

- One full-time support position – Development Reviewer (approx. 55% technical review, 25% permitting, balance general administration, \$125,700
- Operating Expenses, what expenses can be attributed to this program.

Senior Development Reviewer

- Training and professional development = \$3,500/yr
- Salaries & Benefits = \$149,500
- Software = \$380/yr
- Equipment = \$150/yr (Boots every two years)
- Professional Association costs = \$350/yr
- Corporate vehicle (Part Time) = \$2,000/yr. (10% of annual vehicle cost)

Sub Total = \$155,880

Development Reviewer

- Training and professional development = \$2,500/yr
- Salaries & Benefits = \$125,700
- Software = \$380/yr
- Equipment = \$150/yr (Boots every two years)
- Professional Association costs = \$350/yr
- Corporate vehicle (Part Time) = \$2,000/yr. (10% of annual vehicle cost)

Sub Total = \$131,080

Total Staff position budget = \$286,960

Budget Associated with Development Review:

- Senior Development Reviewer - \$155,880 x 45% = \$70,200
- Development Reviewer - \$131,080 x 55% = \$72,100

Total Staff Cost Allocated to Development Review:

$\$70,20 + \$72,100 = \mathbf{\$142,300}$

- Contract Services are any parts of this program contracted out.
- Approximately **\$25,000** spent in 2025.
- Capital Expenditures, what capital costs are associated with this program.
- Minimal; primarily related to systems and software tools.

Total Budget (Staff cost + consultant allocation):

- $\$142,300 + 25,000 = \mathbf{\$167,300}$

Option A Total Budget of \$167,300 is used as a **baseline** to compare other options.

Special Considerations

Although the total program budget reflects two full-time staff positions, it is important to note that the Development Reviewer position has remained vacant since its initial approval by Council due to hiring challenges, uncertainties related to pay equity, and the recent hiring

freeze.

Option B

The Hybrid Model includes:

- 1 × Full-time internal staff
- External consultants engaged as required.

Internal Staffing Cost

- 1 staff development review allocation (45% of \$155,880) = \$70,200

Consultant Costs

- Estimated annual consultant cost: \$25,000.

Option B Total Budget (Staff cost + consultant allocation):

- \$70,200 + 25,000 = **\$95,200**

Special Considerations

A significant portion of consultant costs is recoverable through development application fees, in accordance with existing County by-laws. This reduces the net financial impact on the County, while maintaining service levels. The \$25,000 consultant cost shown above represents costs that may not be recoverable.

As this model reflects the current staffing complement (with the Development Reviewer position vacant), it has been shown to adequately meet service needs based on the volume of applications received in 2025.

Option C

The Fully External Model includes:

- External consultants engaged to deliver all development review services

Internal Staffing Cost: None

Option C Total Budget (Consultant cost):

- Estimated annual consultant cost: \$195,040

Special Considerations

While a portion of consultant costs may be recoverable through development application fees in accordance with existing County by-laws, the overall program cost remains significantly higher than both Option A and Option B.

This model introduces increased exposure to market rates and greater cost variability, as all services are delivered externally. It also reduces internal capacity and institutional knowledge, which may impact long-term service sustainability and responsiveness.

Compared to Option B (Hybrid) at \$95,200 annually, Option C represents an increase of approximately \$99,840 (approximately 105% higher). As a result, Option C provides limited

financial advantage while increasing overall program costs and reducing cost control.

Financial Comparison – Development Review Service Delivery Models

Financial Component	Option A	Option B	Option C
Internal Staffing Costs	High - Two full time engineering staff salaries and benefits	Moderate – 1 Staff and benefits combined with consultant costs	Low- Minimal internal staffing required (administrative coordination only)
Consultant Costs	Low - Limited to specialized technical reviews (e.g., traffic modelling, complex servicing)	Moderate- used strategically and partially cost recoverable	High - Required for most development review activities
Cost per Application	Moderate – majority of reviews completed internally	Low- balanced internal and consultant costs	High – consultant fees applied to most files
Cost Predictability	High – internal staffing costs are stable year to year	High- stable base cost with scalable adjustments	Low – consultant costs fluctuate with development volume
Financial Flexibility	Low- fixed staff costs	High-scalable based on current workload	Moderate-based on consultant availability and market rates
Exposure to Market Rate Increases	Low – consultants used selectively	Moderate – partially mitigated through internal staff cost	High – consultant rates directly impact program costs
Long-Term Financial Stability	High – internal expertise reduces reliance on external services	High – predictable base cost, with fluctuations partially offset through cost recovery.	Low – program costs tied to consultant market rates

Summary

The financial comparison demonstrates that Option B provides the most balanced and sustainable approach. While Option A offers high-cost predictability and long-term stability

through internal staffing, it lacks flexibility due to fixed costs. Option C, by contrast, carries the highest costs, lowest predictability, and greatest exposure to fluctuations in market rate due to its reliance on consultants. Option B achieves a strong balance by maintaining a stable internal base while using consultants strategically, resulting in lower cost per application, greater financial flexibility, and improved resilience to changing workload demands.

Projected Savings:

When comparing Option A to Option B, the projected annual savings are approximately \$65,000, reflecting the avoidance of fixed staffing costs associated with the second approved position, while maintaining service levels through scalable and partially cost-recoverable consultant support.

Cost-Benefit Analysis:

Option B delivers approximately **\$72,000** in annual savings by avoiding underutilized staffing costs while maintaining service levels through scalable consultant support. The primary trade-off is increased reliance on consultants and redistribution of some internal responsibilities throughout the already stressed Engineering team.

Support Costs:

Support costs associated with Option B (Preferred) consist primarily of existing corporate services required to support program operations. These include information technology services for document and file management, finance support for budget tracking and processing consultant invoices, procurement services for managing consultant contracts, human resources support related to staffing and payroll, and administrative support for coordination and record management. Management oversight is also required to supervise the program and approve engineering comments. As these services are already provided as part of normal municipal operations, no additional costs are anticipated.

5. Service Delivery Impact

Updated Service:

Option B represents a refinement of the existing service, rather than a reduction. Considering the vacancy on the Engineering Team, this effectively reflects how the service is currently being delivered.

Development review services will continue to include:

- Technical review of development applications
- Traffic and access evaluation
- Infrastructure impact assessment
- Coordination with capital planning

These services will be delivered through:

- One internal staff resource providing oversight and coordination.
- External consultants supporting peak workload and specialized reviews

- **Revised Goals and Objectives:** (list revised)
- Align staffing resources with current and projected workload demand.
- Maintain high-quality engineering review and infrastructure protection.
- Improve financial efficiency and cost control.
- Enhance flexibility to respond to fluctuations in development activity.
- Leverage cost recovery mechanisms to minimize municipal cost exposure

New Service Delivery Model:

Option B will be delivered through a combination of:

- Direct internal service delivery (core review, coordination, approvals)
- Contracted consultant support (specialized and peak workload)
- This approach maintains internal control while introducing a flexible, scalable resource model.

Impact on Service Recipients: Who will be affected and how?

Option B is not expected to significantly impact service recipients. Applicants will continue to receive coordinated and technically sound engineering review. During peak periods, consultant involvement may be more visible; however, internal oversight will ensure consistency and adherence to County standards.

Access and Equity Considerations:

The proposed change is not expected to create disproportionate impacts on any specific group. Development review processes will continue to be applied consistently across all applications. No barriers to access or service delivery are anticipated.

Quality Assurance Measures:

Service quality will be maintained through:

- Internal staff retaining final review and approval authority.
- Use of qualified and experienced consultants
- Adherence to County standards, policies, and review procedures
- Ongoing monitoring of review timelines and performance

6. Impact Analysis

Alignment with Strategic Goals:

Option B supports key municipal priorities, including fiscal responsibility, efficient service delivery, sustainable growth management, protection of County infrastructure, and organizational resilience and adaptability.

Positive Impacts:

- Annual cost savings of approximately \$72,100
- Improved alignment between staffing and workload demand
- Increased flexibility to respond to development activity fluctuations.
- Reduced fixed cost exposure.

- Continued protection of infrastructure and service quality
- Utilization of cost recovery mechanisms to offset consultant costs

Negative Impacts:

- Redistribution of non-development responsibilities across the Engineering Team
- Increased reliance on external consultants during peak periods
- Potential for increased workload pressure on existing staff
- Reduced internal redundancy compared to a two-staff model.

7. Risk Assessment

Identified Risks:

- Limited Capacity: A smaller team may face pressure during periods of increased development activity.
- Reliance on Key Staff: Greater dependence on individual staff may impact service during absences or turnover.
- Consultant Availability: Workload spikes may require consultant support, which can vary in availability.
- Cost Fluctuation: Use of consultants during peak periods may temporarily increase program costs.

Mitigation Strategies: Steps to manage or reduce risks.

- Cross-Training and Documentation: Maintain clear procedures and cross-training to reduce reliance on individual staff members.
- Standing Consultant Agreements: Establish pre-qualified consultant contracts to ensure timely access to specialized expertise when required.
- Workload Monitoring: Regularly review development application volumes to determine if additional staffing or consultant support is needed.

8. Compliance and Regulatory Review

Regulatory Requirements:

The program supports compliance with Planning Act requirements, engineering standards, environmental regulations, and municipal bylaws.

Compliance Status:

Past performance shows that response times have occasionally been delayed during peak development periods due to limited internal capacity and increased application volumes. These short-term delays highlight the need for flexibility within the service delivery model to address fluctuations in development activity.

Legal Implications:

Legal implications associated with Option A and Option B are minimal. However, internal engineering reviews must continue to meet professional standards and be applied consistently to ensure compliance with municipal policies and statutory planning timelines.

9. Stakeholder Feedback

External/Community Input:

Developers and agencies rely on consistent, authoritative County review for certainty and coordination.

Internal Feedback:

Engineering, Planning, Legal, and Finance depend on this program to manage risk and workflow efficiently.

10. Change Management

Change Management Strategy:

The transition to Option B will be managed as a refinement of the current service delivery approach, rather than a reduction in service.

Key elements of the change management strategy include:

- **Clear Internal Communication:**
Communicate the rationale for the change to Engineering, Planning, and corporate teams, emphasizing alignment with workload demand, financial responsibility, and continued service delivery.
- **Role Clarity and Expectations:**
Define roles and responsibilities for the internal staff resource and identify how consultant support will be integrated into the workflow.
- **Ongoing Monitoring:**
Establish performance tracking (e.g., review timelines, consultant usage) to ensure the model is functioning as intended.

Stakeholder Engagement Plan:

Internal stakeholders, including Engineering, Planning, and management staff, will be informed of the changes through departmental meetings and written communication.

Transition Plan:

The transition to Option B will be implemented using a phased approach, leveraging existing resources and processes.

Step 1 – Confirm Service Delivery Model (Immediate)

- Confirm adoption of Option B (Hybrid)
- Maintain current staffing level (1 internal staff)
- Responsible: SMT/Council

Step 2 – Formalize Consultant Support (0–3 Months)

- Establish or confirm standing consultant agreements.
- Define scope of services for external review support.
- Align procurement and finance processes for cost recovery.
- Responsible: Engineering / Procurement / Finance

Step 3 – Define Internal Workflows (0–3 Months)

- Clarify roles for internal staff vs. consultants.
- Establish triggers for when consultant support is engaged (e.g., workload thresholds, complexity)
- Document procedures for review coordination and approvals.
- Responsible: Engineering

Step 4 – Redistribute Non-Development Duties (0–6 Months)

- Review responsibilities associated with the vacant support position
- Reassign non-development tasks across the Engineering Team as appropriate.
- Monitor workload impacts and adjust as needed.
- Responsible: Engineering Manager

Step 5 – Monitor and Adjust (Ongoing)

Track:

- Development application volumes
- Review timelines
- Consultant usage and costs
- Reassess staffing requirements if:
 - Sustained increase in development activity occurs.
 - Service levels are impacted.
- Responsible: Engineering / Senior Management

11. Summary

The review concludes that Option B (Hybrid) provides the most balanced and sustainable approach to delivering development engineering review services. It aligns staffing resources with current workload demands, improves financial efficiency, and maintains strong internal oversight and infrastructure protection. By combining a stable internal resource with flexible, cost-recoverable consultant support, the option enhances organizational capacity while minimizing long-term financial risk. This approach positions the County to effectively manage current development activity while remaining adaptable to future growth.

**Municipal Program Assessment:
D. Maintenance Technician**

Department/Division: Facilities

Executive Summary

The Maintenance Technician function provides licensed, in-house capability to keep County facilities safe, reliable, and code-compliant while supporting preventive maintenance and asset stewardship. The analysis indicates in-house delivery is generally more economical for high-utilization, core maintenance work, while selective outsourcing can be effective for specialized, intermittent, or overflow tasks. A structured hybrid model (clear boundaries, service-level expectations, and performance monitoring) is identified as the preferred path to balance cost control, service reliability, and risk management.

Three options are explored in this review:

- **Option A — Maintain primarily in-house delivery (status quo with incremental improvements)**

Retain licensed technicians as the primary service model and focus on reducing reactive work and improving preventive maintenance and documentation.

Budget Savings: no direct structural savings assumed; savings would be indirect (e.g., reduced downtime/asset failures) and are not quantified in this report.

- **Option B — Outsource a larger share of maintenance work (contractor-led model)**

Shift more routine and/or reactive maintenance to contractors, retaining limited internal oversight and coordination.

Budget Savings: potential savings are only achievable if contractor all-in rates (including call-out, travel, and admin time) are consistently below the relevant breakeven threshold.

- **Option C — Structured hybrid model**

Maintain in-house technicians for core, high-frequency work (where utilization is high and responsiveness is critical), while outsourcing specialized, intermittent, or overflow work under defined service levels and performance-based expectations.

Budget Savings: savings are scenario-dependent and come from avoiding higher-cost contractor hours for routine work while using contractors only where they are more cost-effective (e.g., specialized work or peaks in demand).

Recommendation:

Proceed with Option C by adopting a structured hybrid service delivery model that keeps licensed technicians in-house for core, high-frequency work and strategically outsources

specialized, intermittent, or overflow work under defined scopes, service levels, and performance expectations.

1. Current Role Overview

Role Name: Maintenance Technician

Department/Division: Public Works – Facilities

Legislative Mandate: OHSA; Fire Code; Building Code; O.Reg 588/17 (indirectly through asset management obligations)

Program Description:

The County relies on in-house licensed Maintenance Technicians to perform the majority of electrical, plumbing, HVAC, and general building maintenance activities requiring trade specific licenses across all facilities. These technicians conduct inspections, troubleshoot issues, complete reactive and preventive maintenance, and support operational continuity. Contractors are engaged for regulatory requirements, and overflow capacity during periods of high demand.

Goals and Objectives:

Ensure Safe, Reliable, and Code-Compliant Building Operations.

- This goal aligns with the Strategic Plan’s priority of supporting community well-being and safety and the County’s obligation to maintain essential public used infrastructure.
- Objectives
 - Perform predictive, preventive, and corrective maintenance to minimize system failures and ensure uninterrupted building operations.
 - Conduct inspections to meet regulatory and safety requirements.
 - Diagnose faults and complete repairs in accordance with ESA, TSSA, OBC, and trade-specific codes.

Extend the Useful Life of County Assets Through Proactive Stewardship

- This goal aligns with the Asset Management Plan’s emphasis on lifecycle management and sustainable service delivery.
 - Execute preventive maintenance schedules that reduce lifecycle costs and extend asset longevity.
 - Identify emerging risks, end of life components, and system deficiencies and escalate recommendations to the Working Foreperson and Facilities Manager.
 - Support capital planning by providing technical input on asset condition, replacement needs, and system performance trends.
 - Ensure contractor work meets County standards and contributes to long term asset performance.

Deliver Responsive, High-Quality Service to Building Users

- This goal aligns with the Strategic Plan's priority of enhancing community well-being and service excellence.
- Objectives
 - Respond promptly to tenant concerns, service requests, and system alarms to maintain a positive user experience.
 - Communicate clearly and respectfully with staff, contractors, and emergency personnel.
 - Provide functional advice to the Facilities Manager and general direction to contractors to ensure work orders are completed effectively.
 - Maintain professionalism during occasional exposure to conflict or rudeness

Support Climate Action and Energy Efficiency

- This goal aligns with the Strategic Plan's priority to establish the County as a leader in climate action.
- Objectives
 - Optimize HVAC, electrical, and plumbing systems to reduce energy consumption and improve environmental performance.
 - Monitor building automation systems and adjust set points to balance comfort, efficiency, and sustainability.
 - Identify opportunities for system upgrades, retrofits, and operational improvements that reduce greenhouse gas emissions.
 - Support implementation of energy efficient technologies and participate in pilot projects or new sustainability initiatives

Contribute to a Collaborative, Inclusive, and Respectful Workplace

- This goal aligns with the County's corporate commitment to equity, anti-racism, and anti-oppression as stated in all three job descriptions.
- Objectives
 - Demonstrate respectful communication and inclusive behaviour with colleagues, contractors, and building users.
 - Participate in training related to equity, safety, and professional development.
 - Support a culture of teamwork by sharing knowledge, assisting colleagues across trades when appropriate, and contributing to problem-solving discussions.
 - Uphold County values in all interactions and decision-making.

Strengths:

- Fast response times; strong building knowledge; lower cost for routine tasks; strong relationships with internal clients.

Weaknesses:

- Limited capacity for specialized work; reactive workload pressures; no formal cost comparison model; inconsistent documentation.

Current Delivery Method:

- In-house Staff

2. Potential Changes

Conduct analysis of outsourcing vs. in-house delivery; consider hybrid model with clear boundaries; standardize contractor response expectations; align technician work with preventive maintenance program; evaluate staffing levels and skill mix.

3. Key Performance Indicators (KPIs)

Current KPIs: Limited; largely anecdotal.

Impact on KPIs: Improved response times; reduced backlog; higher PM completion rates; improved contractor performance tracking.

Data Collection Methods: CMMS, work order logs, contractor reports, Ontario Municipal Reviews – Archived

Title	Publisher / Source	Relevance
Municipal Infrastructure: A Review of Ontario’s Municipal Infrastructure	Financial Accountability Office of Ontario (FAO)	Provincial analysis of municipal asset condition, funding pressures and implications for service delivery choices.
Annual and policy work on municipal workforce & service delivery	Association of Municipalities of Ontario (AMO)	AMO guidance and advocacy on municipal service delivery, workforce development and procurement trends.
Municipal Modernization Program (MMP) reports database	Ontario government / OMAA index of MMP reports	Hundreds of municipal service-delivery reviews funded by MMP; contains many local case studies comparing in-house vs outsourced models.
Selected municipal service delivery reviews	Individual municipalities (MMP reports)	Practical cost tables, utilization analyses and recommended hybrid models; use as direct comparators

Baseline Data: Past operating budgets – 2021 – 2025

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs

- Facilities technician roles salaries and benefits is approximately \$137,500

Operating Expenses

- Protective footwear, professional development, tools, cell phone, fleet costs \$12,600

Capital Expenditures

- Each technician has a dedicated vehicle for tools and equipment replacement costs is currently budgeted at \$70,000 with an eight year lifecycle
- To compare to hourly rate of contractor, included only operating and personnel costs plus a 15% overhead to determine a per hour rate of staff
- Total costs +15% = \$172,615 or \$90.88

Projected Savings:

- Contractor rates range between \$90 and \$200 per hour depending on the required service and scope. At a current rate of \$90.88 it is cheaper to utilize in house services
- However this \$90.88 is based on working a full 1,820 hours per year which is not reasonable as staff are entitled to time off

Cost-Benefit Analysis:

Benefits of In-House Licensed Trades

Faster response and higher control

- Immediate dispatch for urgent issues without waiting on vendor availability.
- Direct supervision allows direct enforcement of standards, safety practices, and documentation quality.
- Better alignment with County priorities, especially when balancing risk, service levels, and political expectations.

Institutional knowledge of facilities

- Staff understand legacy systems, operational quirks, and historical repairs, reducing diagnostic time.
- More accurate preventive maintenance because they know what actually fails in your buildings—not just what the OEM manual says.

Predictable costs

- Labour is budgeted and stable, avoiding vendor call-out premiums, travel charges, and emergency multipliers.

- Helps with multi-year capital and operating forecasting, especially in municipalities where cost certainty matters.

Better integration with other County functions

- Easier coordination with security, IT, operations, and capital project teams.

Workforce reliability and accountability

- You can train, cross-skill, and performance-manage staff.
- Reduces risk of inconsistent workmanship from rotating contractors.

Costs and Challenges of In-House Licensed Trades

Higher fixed labour cost

- Overtime and standby requirements can add pressure.

Recruitment and retention difficulties

- Licensed trades (electricians, plumbers, HVAC techs) are in short supply, and municipalities often can't match private-sector wages.
- Risk of vacancies leading to service gaps.

Training, certification, and compliance overhead

- Maintaining licenses, safety training, and equipment calibration requires ongoing investment.
- Administrative burden for tracking competencies and regulatory compliance.

Capital tools, vehicles, and equipment

- Upfront and ongoing costs for service vehicles, diagnostic tools, PPE, and specialty equipment.
- Replacement cycles must be budgeted.

Support Costs:

- There are additional costs associated with employees that are expensed in other areas, including software and security related costs, estimated at \$1,200 per employee.
- There is also the time associated with supporting the employee by People and Equity, Finance, IT and Procurement.

5. Service Delivery Impact

Maintained Service:

- More predictable service delivery; improved quality; reduced downtime; clearer division of responsibilities between in-house staff and contractors.

Revised Goals:

- Strengthen technician capacity; reduce reactive work; improve PM compliance.

New Service Delivery Model:

- Hybrid model with defined boundaries and performance expectations.

Impact on Service Recipients:

- Faster response times; improved service consistency; reduced disruptions.

Access and Equity Considerations:

- No negative impacts anticipated.

Quality Assurance Measures:

- SLAs, contractor KPIs, technician performance metrics, CMMS reporting.

6. Impact Analysis

Alignment with Strategic Goals:

- Supports efficiency, accountability, asset stewardship, and SDR modernization.

Positive Impacts:

- Better resource allocation; improved compliance; reduced risk; enhanced service quality.

Negative Impacts:

- Contractor availability risks; transition and training requirements.

7. Risk Assessment

Identified Risks:

- Over-reliance on contractors; cost volatility; skill gaps; inconsistent contractor performance.

Mitigation Strategies:

- Hybrid model; performance-based contracts; training; succession planning.

8. Compliance and Regulatory Review

Regulatory Requirements:

- OSHA; Fire Code; Building Code; asset management obligations.

Compliance Status:

- Compliant.

Legal Implications:

- Improved documentation and defined responsibilities reduce liability.

9. Stakeholder Feedback

Internal Feedback:

- Departments value quick in-house response; support outsourcing specialized tasks.

External Feedback:

- Contractors support clearer expectations and scopes.

10. Change Management

Change Management Strategy:

- Communication, training, contractor onboarding, workflow updates.

Stakeholder Engagement Plan:

- Meetings with FM staff, HR, Procurement, and key contractors.

Transition Plan:

- 6–12 month phased rollout with monitoring and adjustments.

Municipal Program Assessment: Working Foreperson

Department/Division: Facilities

Executive Summary

This review assesses the Facilities Division's Working Foreperson role within the current facilities service delivery model and reviews whether the role should be kept, eliminated, or restructured, based on evidence about cost, workload, and operational impact.

It is evaluating the value and criticality of the Working Foreperson role as an operational anchor, restructuring scenarios, performance and workload indicators, budget and financial impacts and service delivery and operational impacts.

Three options are reviewed as part of this assessment:

- **Option A – Eliminate the Working Foreperson role**

Eliminates approximately \$171,350 in direct salary cost, but requires replacing 1,820 hours/year via overtime/contractors.

Budget Savings: None. Net budget impact is a loss of \$40,000–\$60,000 annually

- **Option B – Transition the role to a Maintenance Technician (Grade F) and shift supervision to the Facilities Coordinator:**

Generates approximately \$6,900 in salary savings, but adds an estimated \$55,315 in overtime/oversight/contractor costs.

Budget Savings: None. Net budget impact is an annual loss of approximately \$47,410.

- **Option C – Retain and refine the Working Foreperson role:**

Budget Savings: None. Focuses on role clarity, shifting administrative/ strategic tasks to the Facilities Coordinator, and strengthening field leadership to reduce operational risk and avoid cost escalation associated with Options A and B.

Recommendation:

Proceed with Option C - Retaining and refining the role, rather than removing or reclassifying it, offers the strongest operational stability, the lowest financial risk, and the greatest alignment with the County's goals for asset stewardship, service quality, and workforce sustainability. Overall, the evidence shows that the Working Foreperson is essential to maintaining safe, reliable, and cost-effective facility operations.

The financial analysis indicates neither restructuring option produces net budget savings; both increase cost and operational risk. The report supports retaining the Working Foreperson and

implementing targeted role clarification and workflow improvements as the lowest-risk path for service reliability and cost control.

1. Current Role Overview

Review Focus: Working Foreperson

Department/Division: Facilities

Legislative Mandate (if applicable): None

Role Description:

Reporting to the Facilities Manager, the Working Foreperson is responsible for supporting day-to-day operation of all County facilities. The position provides leadership to staff and plays a key role in maintaining a positive culture and morale in the workplace. The Foreperson delegates workload and daily tasks to staff, assists with the coordination of contractors and third party services, and plays a key role in performing maintenance and repairs.

Role Responsibility and Objectives:

- Ensure safe, reliable facility operations that minimize downtime and protect public assets.
- Deliver timely, customer focused maintenance services through an FSCCaligned single intake and clear role boundaries.
- Optimize skilled labour utilization by protecting field supervision time and centralizing administrative functions.
- Reduce total cost of ownership by improving preventive maintenance, reducing emergency vendor spend, and lowering rework.
- Strengthen workforce capability and morale through clear leadership, training, and career pathways.

Strengths:

- Rapid emergency response and containment — First-response capability addressing emergency and immediate priority work orders (HVAC failures, flood response, elevator faults, security/door issues)
- Broad technical competence across trades —WOs span HVAC, plumbing, electrical, elevators, security and grounds. Role provides ability to diagnose and resolve diverse problems without immediate vendor reliance.
- High throughput and ownership of tasks — productivity extracts require the foreperson role to provides strong individual output and willingness to own end-to-end resolution.
- On-site supervision and quality control — role includes directing crews, supervising contractors on site, and enforcing safety and workmanship standards, which reduces rework and supports right-first-time outcomes.
- Customer responsiveness and service orientation — many short, tenant-facing tasks (keys, unlocking doors, flag/bench requests, small moves) are handled promptly, preserving internal customer satisfaction.

- Flexibility and adaptability — the foreperson role handles both planned turnovers and unplanned emergencies, showing capacity to shift priorities under pressure.

Weaknesses:

- Role dilution (administrative burden) — Significant time on procurement, invoicing, and vendor admin, which reduces hands-on supervision and increases average hours per work order as field time is lost.
- Reactive overload — High volume of same-day/emergency WOs fragments schedule, preventing contiguous blocks for larger repairs and driving travel/setup inefficiency.
- Task fragmentation from many short errands — Frequent small requests (keys, flags, furniture moves) create numerous short trips and context switches that lower per-shift productivity and raise labor cost per WO.
- CMMS and documentation gaps — Inconsistent same-shift notes, photos, and labor entries weaken planning, PM scheduling, and accurate workload forecasting, causing repeat visits and stalled projects.
- Insufficient delegation and support capacity — Lack of a dedicated support technician or clear handoffs forces the foreperson role to juggle complex repairs and routine tasks, producing backlog on multi-step projects and increasing burnout risk.

Current Delivery Method: Internal Staff

2. Potential Changes

- Evaluate the Working Foreperson role within the current service delivery model to identify value of core responsibilities and identify potential for organizational restructuring.
Examining 2 scenarios:
 - Elimination of role in its entirety
 - Transition of role to maintenance technician

3. Key Performance Indicators (KPIs)

Current KPIs:

- Cost Time Analysis, Work Load Analysis, Annual Overtime Costs

Data Collection Methods:

- CMMS Platform, Payroll Management

Baseline Data:

- Existing performance data before change.

4. Budget and Financial Analysis

Current Budget Breakdown:

- Personnel costs are approximately \$150,000
- Operating expenses

- Protective footwear, professional development, tools, cell phone, fleet costs \$12,600
- Contract Services
- Capital Expenditures
- Vehicle, \$70,000, with an eight year life cycle

Cost-Benefit Analysis:

Option A – Role Elimination:

- Eliminating the Working Foreperson role and redistributing work to existing staff.
- Eliminating all supervisory, coordination, and workflow-management duties and relying on FSCC and CMMS process flows.

Annual Hours to Replace

Working Foreperson works: 35 hrs/week × 52 = 1,820 hrs/year

- All 1,820 hours must be redistributed. Currently maintenance technician staff are at full workload.

Overtime Rule Applied – Maintenance Technician Pay

For redistributed hours:

- Hours 35/week → straight-time at \$56.18/hr
- Hours 40+ → overtime at \$84.27/hr

This means each week, only 5 hours can be absorbed at straight-time. The remaining hours must be overtime or contractors.

Summary Table (Pay Grid + Overtime Rule)

Scenario	Total Added Cost	Cost Saved	Net Impact
Transitioning Role and Distribution minimized to staff tech	\$190,400	\$150,000	-\$40,400
Heavy contractor reliance	\$228,100	\$171,350	-\$56,750

Option B – Role Transition:

- Transitioning the Working Foreperson into a Maintenance Technician (Grade F) while shifting all supervisory, coordination, and work flow management duties to the Facilities Coordinator

Estimated replacement cost

To maintain field oversight, the County will need:

- 2–5 hours/week of technician overtime for site checks, QA, and contractor oversight
- 5–10 hours/week of Coordinator time for supervision and workflow management
- Occasional contractor hours for specialized oversight or inspections

Technician overtime: 5 hrs/week · 84.27 = 21,910

Coordinator added workload (implicit cost): $10 \text{ hrs/week} \cdot 51.94 = 27,000$

Contractor oversight (occasional): $2 \text{ hrs/week} \cdot 51.94 = 5400$

Total added cost: $21,910 + 27,000 + 5,400 = 54,310$

Net impact: $6,900 \text{ savings} - 54,310 \text{ added cost} = -47,410$

Net annual loss: $\approx \$47,410$

5. Service Delivery Impact

Operational impact:

Option A: Remove the role entirely

- Loss of 1,820 hours/year of technical and supervisory capacity.
- Remaining staff already at full workload → all hours replaced through:
 - overtime,
 - contractors,
 - or service degradation.
- Significant increase in:
 - emergency vendor calls,
 - rework,
 - safety/compliance risk,
 - vacancy loss (already \$117k–\$140k annually).
- Highest risk of service failure.

Option B: Transition to Technician

- No loss of technical hours (foreperson becomes a full technician).
- Loss of on-site leadership and field supervision.
- Facilities Coordinator becomes a bottleneck:
 - contractor oversight,
 - daily task assignment,
 - QA,
 - turnover workflow,
 - CMMS enforcement.
- Increased technician overtime for field oversight tasks.
- Moderate increase in contractor oversight costs.
- Lower risk than full removal, but still significant.

Key takeaway: Transitioning preserves technical capacity but creates a supervisory gap that the Coordinator cannot absorb without cost and service degradation.

6. Impact Analysis

Impact on Service Recipients:

Area	Role Removal	Transition to Technician
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Area	Role Removal	Transition to Technician
Turnover timelines	Strong negative impact	Moderate negative impact
Vacancy loss	Likely to increase significantly	Likely to increase modestly
PM completion	Declines sharply	Declines moderately
Emergency response	Slower, more vendor dependent	Slower, but less severe
Quality assurance	Major gap	Moderate gap
Staff morale	High risk of burnout	Medium risk
Safety oversight	High risk	Medium risk

Key takeaway: Transitioning is operationally safer than removal, but both reduce service quality.

7. Risk Assessment

Identified Risks:

Loss of supervisory presence leads to:

- more safety incidents,
- more rework,
- more emergency vendor calls,
- higher vacancy loss,
- lower tenant satisfaction.

Transition to Technician

- Coordinator overload is the primary risk.
- Field oversight gaps still exist but are smaller.
- Vacancy loss risk increases but not as sharply.

Review Summary:

A comparison of the two restructuring scenarios—Removal of the Working Foreperson role and Transitioning the role into a Technician while shifting supervisory duties to the Facilities Coordinator—shows that neither option delivers financial savings or operational stability on its own. Both introduce service, safety, and workload risks that outweigh the limited salary savings. The analysis supports an **Option C: realigning the role to better complement the Facilities Coordinator**, preserving field leadership while reducing administrative burden and improving workflow clarity.

Option A: Removing the Working Foreperson Role

Eliminating the role produces an immediate salary reduction of \$171,350, but the County must replace 1,820 hours/year of supervisory and technical work. Because all staff are already at full workload, these hours shift to overtime, contractors, and degraded service levels. Using updated pay-grid rates and correct overtime rules, the total replacement cost ranges from \$190,400 to \$228,100, resulting in a net annual loss of \$40,000–\$60,000.

Operationally, the loss of on-site leadership slows unit turnover, increases vacancy loss, reduces first-time fix rates, and raises safety and compliance risks. The Facilities Coordinator becomes overloaded with field supervision, contractor oversight, and workflow management, creating a single point of failure. This scenario carries the highest financial and operational risk.

Option B: Transitioning the Foreperson into a Technician

Reclassifying the Working Foreperson to a Technician reduces hourly cost from \$61.27 to \$56.18, generating only \$6,900 in annual savings. However, supervisory duties shift to the Facilities Coordinator, who must absorb 10–15 hours/week of additional oversight, contractor management, and workflow coordination. Technicians must also take on field oversight tasks through overtime, and contractors fill remaining gaps.

The combined cost of overtime, Coordinator workload, and contractor oversight totals \$55,315, resulting in a net annual loss of approximately \$47,000. While this scenario preserves technical capacity, it still weakens field supervision, slows turnover timelines, and increases vacancy loss risk. It is less damaging than full removal, but still not financially or operationally viable without further redesign.

8. Recommendations

Clarify and Separate Role Mandates

- Facilities Coordinator: administrative and strategic support.
- Working Foreperson: operational and technical leadership.
- Centralize Work Order Intake and Prioritization under the Coordinator.
- Consolidate Operating Procurement elements under the Coordinator.
- Establish a Single Contractor Liaison (Foreperson).
- Strengthen FSCC Integration.

Role-Clarity RACI Matrix

4.1 Work Order Management (FSCC-Aligned)

- Responsible (R): The person or team who does the work to achieve the task or deliverable.
- Accountable (A): The person who signs off on the work and is ultimately responsible for the successful completion of the task. Only one person should be accountable per task
- Consulted (C): Subject matter experts or stakeholders who provide input, feedback, or knowledge before the task is completed.
- Informed (I): Stakeholders who are kept updated on progress or decisions after they are finalized, but do not directly contribute to the work.

Activity	FM	FC	WFP	CPM
Intake of all work requests (FSCC)	I	A/R	I	I
Prioritization & categorization	C	A/R	C	I

Assignment of work to staff/contractors	C	I	A/R	I
Status updates & communication	I	A/R	A/R	C (capital only)
Close-out & documentation	I	A/R	A/R	C (capital only)

4.2 Contractor & Vendor Management

Activity	FM	FC	WFP	CPM
Primary contractor liaison	I	C	A/R	R (capital projects)
On-site supervision	I	I	A/R	R (capital projects)
Contract compliance monitoring	C	C	A/R	A/R (capital)
Performance issues & escalation	A/R	C	C	C

4.3 Procurement & Purchasing

Activity	FM	FC	WFP	CPM
Purchase requisitions	C	A/R	I	R (capital)
RFQ/RFP/Tender coordination	C	A/R	I/C	A/R (capital)
Vendor onboarding	C	A/R	I	C
Budget alignment	A/R	C	I	C
Invoice verification	C	A/R	I	A/R (capital)

4.4 Staff Leadership & Field Operations

Activity	FM	FC	WFP	CPM
Daily direction of maintenance staff	I	I	A/R	I
Scheduling & task planning	C	I	A/R	I
Health & safety compliance	A/R	C	R	C
Training & skills development	A/R	C	R	C
Acting leadership coverage	A	R (admin)	R (ops)	C

4.5 Capital Projects & Asset Management

Activity	FM	FC	WFP	CPM
Project scoping	A/R	C	C	A/R
Engineering design coordination	C	I	I	A/R
Capital budget estimates	A/R	C	I	A/R
Approvals (CA, Ministry, etc.)	A/R	I	I	R
Capital procurement (RFP/RFQ/Tenders)	C	C	I	A/R
Site inspections	C	I	I	A/R
Contract administration	C	I	I	A/R
Payment certificates & change orders	C	I	I	A/R
Capital project reporting	C	A/R	C	A/R
Asset inventory updates	C	A/R	I	R

4.6 FSCC Integration & Communication Pathways

Activity	FM	FC	WFP	CPM
Single-intake channel maintenance	I	A/R	I	I
Communication standards	A/R	C	C	C
Issue escalation	A/R	R	R	R (capital)

4.7 Risk Management & Public/Stakeholder Interaction

Activity	FM	FC	WFP	CPM
Building investigations	C	I	R	A/R (capital)
Responding to public inquiries	C	R	R	R
Identifying project risks	C	I	C	A/R
Liaison with consultants & agencies	C	I	C	A/R

Municipal Program Assessment: Housing Unit Turnover Procedure

Department/Division: Facilities Management/Housing Services

Executive Summary

A unit turnover procedure is the end-to-end process used to return a vacated community housing unit to a safe, functional, “move-in ready” condition between tenancies.

This report assesses the County’s Housing Unit Turnover Program to determine why units remain vacant beyond target timelines and to identify practical service-delivery options to reduce vacancy duration, improve quality and compliance, and better align outcomes with the requested 30-day turnaround target. It summarizes current performance, identifies the key process bottlenecks and presents options for potential cost savings - up to and including end-to-end outsourcing under enforceable performance targets - to support decision-making and implementation planning.

Three options are considered in this assessment:

- **Option A – Maintain current hybrid delivery model (status quo)**
Budget Savings: none. Maintains current vacancy-loss: \$385,000 over three years
- **Option B – Strengthen the hybrid model through standardization and enforceable Service Level Agreement (SLAs)**
Budget Savings: estimated vacancy-loss reduction 30–50%; \$40,000–\$75,000 annual additional rent revenue
- **Option C – Outsource end-to-end Unit Turnover Service under performance-based SLAs**
Budget Savings: estimated \$40,000–\$75,000 annual additional revenue generation

Recommendation:

To proceed with Option C – outsourcing the end-to-end Housing Unit Turnover Service under performance-based Service Level Agreements (SLAs). This approach would shift responsibility for unit turnovers to a qualified contractor operating under clearly defined timelines, quality standards, and accountability measures. Based on turnover data and the Avaanz (2022) review, outsourcing is expected to reduce vacancy durations, provide predictable “move-in ready” dates, and achieve a 30–50% reduction in vacancy loss, generating approximately \$40,000–\$75,000 in annual additional rent generation, while allowing County staff to focus on preventive maintenance and core facility operations.

1. Current Program Overview

Program Name: Housing Unit Turnover

Department/Division: Public Works – Facilities Management / Community Housing

Legislative Mandate: Housing Services Act; Fire Code; Building Code; County Housing Standards

Program Description:

The Turnover Program prepares community housing units between tenancies by coordinating cleaning, repairs, painting, flooring replacement, safety checks, and final readiness inspections. Delivered in close partnership with Community Housing as the lead stakeholder, the program ensures that turnover work reflects operational priorities, occupancy pressures, and tenant service expectations. Each vacated unit is assessed using asset management practices to determine its current state, identify lifecycle needs, and confirm alignment with standardized service levels and SLAs. This structured assessment also evaluates aging in place suitability and opportunities to improve accessibility, ensuring that turnover activities not only restore the unit to a safe, functional, and move in ready condition but also contribute to long term asset performance, regulatory compliance, and tenant wellbeing

Goals and Objectives:

- Reduce vacancy loss and turnaround time
- Standardized quality and scope of work
- Improve tenant experience
- Ensure compliance with housing standards and safety requirements.
- 30-day turnaround time frame requested

Strengths:

- Dedicated staff and site knowledge — Inhouse teams hold institutional knowledge that speeds diagnostics and supports right first time fixes.
- Hybrid delivery flexibility — Combination of staff and contractors allows targeted outsourcing while retaining control over safety critical tasks.
- Strong contractor relationships — Existing vendor networks enable rapid engagement for specialty trades when needed.
- High ROI potential from standardization — Standard workflows and SLAs are low cost to implement and can materially reduce vacancy loss.

Weaknesses:

- Operational bottlenecks in hybrid model — Staff handling minor repairs and coordination creates scheduling handoffs and delays.
- Weak contractor SLAs and performance monitoring — No consistent guaranteed timelines for full turnover packages, producing variable quality and timing.

- Parts and staging gaps — Limited prestaging and parts kit availability cause delays and repeat visits for simple consumables.

Current Delivery Method: Hybrid (County staff + contractors).

2. Areas under consideration

- Review of end-to-end turnover procedure; scope, timelines, quality standards
- Review contractor performance expectations; integrate workflow into CMMS
- Evaluate outsourcing vs hybrid delivery.
- Evaluate turnover procedure while space is occupied, eliminating deferral of capital replacement costs.

3. Key Performance Indicators (KPIs)

Current KPIs:

1. Turnover cycle time: Average turnover duration

2022	2023	2024	2025
N/A	N/A	99 Days	92 Days

2. Unit Turnover Performance: Total Vacancy Loss/Total Units Turned Over

2022	2023	2024	2025
\$4908.27/unit	\$4019.09/unit	\$3675.95/unit	\$4428.88/unit

Recommended KPIs:

1. Percentage of Units Meeting 30-Day Turnover Target
2. Percentage of Units with Ready Date Provided Within 5 Days
3. Units Exceeding 60/90/180 Days Vacant
4. Operational Holds (count and duration)

Baseline Data:

- 2023 vacancy loss: **\$128,610**
- 2024 vacancy loss: **\$139,686**
- 2025 vacancy loss: **\$117,448**

Supporting Evidence:

- 2024 Days Vacant After Move Out ranged from 110 to 761 days
- 2025 Days Vacant After Move Out ranged from 92 to 761 days
- Median vacancy duration across both years: 120–150 days
- Turn over to move in delays were generally low (0–15 days), confirming that facilities delays are the primary cause of vacancy loss

4. Budget and Financial Analysis

Current Budget Breakdown:

- Personnel Costs – Facility Management and Housing labour costs are not categorized specific to unit turnover
- Contract Services are used for specialty plumbing, flooring, painting, and kitchen improvements
- Capital Expenditures for Bathroom, Kitchen and flooring assets

Projected Savings:

- Implementing standardized workflows and SLAs could reduce vacancy loss by 30–50%, generating annual savings of \$40,000–\$75,000 through decrease in vacancy loss.

Cost-Benefit: High benefit relative to minimal implementation cost.

Support Costs: CMMS configuration, procurement support.

5. Service Delivery Impact

Updated Service:

A third party executed Unit Turnover Service is a contracted, end-to-end delivery model where a qualified vendor (or vendor consortium) assumes full responsibility for preparing vacated housing units to a County approved “move in ready” standard within guaranteed timelines. The vendor delivers cleaning, repairs, painting, flooring, safety checks, minor trades, final inspection, and ready date notification as a single bundled service under a performance contract with SLAs, quality checklists, and financial incentives/penalties.

Revised Goals: Reduce vacancy time; improve quality; ensure compliance.

Impact on Service Recipients: Faster access to housing; improved unit quality.

Access and Equity Considerations: Positive impact on vulnerable tenants.

Quality Assurance Measures: Checklists, inspections, CMMS tracking.

6. Impact Analysis

Alignment with Strategic Goals: Supports housing stability, asset stewardship, SDR goals.

Positive Impacts: Reduced vacancy loss; improved tenant satisfaction.

Negative Impacts: Change management required.

7. Risk Assessment

Identified Risks: Contractor delays; staff resistance; inconsistent adoption.

Mitigation Strategies: Training, clear SLAs, performance monitoring.

8. Compliance and Regulatory Review

Regulatory Requirements: Housing Services Act; Fire Code; Building Code.

Compliance Status: Compliant but inconsistent documentation.

Legal Implications: Improved documentation reduces liability.

9. Stakeholder Feedback

Internal Feedback:

Data Driven Feedback: 2024–2025 turnover data shows:

- Long delays between move-out and turnover completion
- Inconsistent ready-date communication
- Units held vacant for internal reasons
- Leasing delays are minimal compared to facilities delays

External Feedback:

- Tenants desire faster turnaround and consistent quality.

10. Change Management

Change Management Strategy: Training, workflow rollout, pilot testing.

Stakeholder Engagement Plan: Communication with Housing staff, FM team, contractors.

Transition Plan: 3–6 month phased rollout with monitoring and adjustments.

Additional Recommendations:

- Monthly vacancy dashboard
- Quarterly SLA review
- Annual turnover performance audit
- Contractor roster development

11. Integration of Avaanz Outsourcing Review Findings (2022)

11.1 Background

- In 2022, Avaanz Ltd. completed a review of the County's Facilities Management service delivery model. The review examined outsourcing opportunities across seasonal maintenance, janitorial services, and community housing renovations, with the goal of improving efficiency, reducing costs, and freeing staff time for core responsibilities.
- Avaanz identified community housing renovations as a key area where outsourcing could significantly improve turnover timelines. Their report noted:
- "The current approach to performing renovations at community housing is resulting in an average turnover time of nearly 3 months between tenants."
- This aligns directly with the County's 2024–2025 turnover data, which shows median vacancy durations of 120–150 days, with outliers exceeding 300–700 days.

11.2 Alignment Between Avaanz Findings and Current Turnover Data

A. Staff Performed Turnover Work Creates Delays

- Avaanz found that the hybrid model—contractors for major work, staff for minor repairs—creates bottlenecks. Data confirms this: turnover delays, not leasing delays, drive vacancy loss.

B. Outsourcing Could Reduce Turnover to Under 30 Days

- Avaanz recommended contractual turnaround times under one month. This aligns with the County’s 30-day program target.

C. Outsourcing Frees Staff for Preventive Maintenance

- Avaanz emphasized that outsourcing increases staff availability and reduces overtime. Your data shows staffing constraints contribute to delayed ready dates and operational holds.

11.3 Updated Interpretation Based on 2024–2025 Data

- Vacancy loss is now quantifiable: approximately \$385,000 over three years
- Most losses are caused by turnover delays
- Outsourcing could reduce vacancy loss by 30–50%
- Staffing constraints remain unchanged since 2022
- Housing waitlist pressure has increased

11.4 Updated Recommendation

Adopt a phased outsourcing model for community housing turnover work, including:

- Cleaning
- Painting
- Flooring
- Minor repairs
- Full turnover packages with guaranteed timelines

Recommended SLA Framework:

- Good Unit: 10–15 days
- Full Turnover: 30–45 days
- Ready Date Provided: within 5 days of move-out

11.5 Benefits of Integrating Avaanz Recommendations

Operational Benefits

- Predictable timelines
- Reduced vacancy loss
- Improved tenant experience
- Standardized quality
- Reduced internal workload

Financial Benefits

- Vacancy loss reduction (\$40k–\$75k annually)
- Reduced overtime
- Reduced rework

Strategic Benefits

- Supports SDR goals
- Improves housing access
- Strengthens asset stewardship

11.6 Conclusion

The Avaanz outsourcing review and the County's 2024–2025 turnover data point to the same conclusion: The current hybrid turnover model does not meet operational or financial objectives. Outsourcing turnover, with clear SLAs is the most effective path to reducing vacancy loss and achieving a 30 day turnaround and saving \$40-75,000 annually.

**Municipal Program Assessment:
Facilities Management – Procurement Strategies**

Department/Division: Facilities Management

Executive Summary

The report assesses the County’s current approach to procuring technical assessments and engineering documentation for capital projects and identifies opportunities to improve efficiency, reduce costs, and shorten project timelines. The report explores alternative procurement approaches and recommends a balanced model that preserves compliance and public trust while delivering measurable savings and operational efficiencies.

- **Option A – Status Quo: Competitive Procurement for All Assessments**
Continue using traditional RFP and tender processes for all asset assessments and technical documentation, regardless of whether systems are proprietary.
Budget Savings: None.
- **Option B – Manufacturer-Led Assessments (Sole Source Where Applicable)**
Use manufacturer-provided assessments, drawings, and specifications for proprietary systems under sole source provisions in the Procurement By-law.
Budget Savings: Estimated \$25,400–\$50,800 in savings for 2026 capital projects, \$1,600 in Procurement staff time and \$900 in Facilities staff time saved per project.
- **Option C – Hybrid Model**
Combine direct manufacturer engagement for proprietary systems with targeted use of engineering consultants for independent review, system integration, and regulatory compliance.
Budget Savings: 20–40% reduction in assessment costs, while mitigating associated risks. Potential redirection of up to \$17,500 in staff time annually

Recommendation:

Progress with Option C – the Hybrid Procurement Model as the preferred approach, delivering meaningful cost savings, faster project initiation, and improved technical accuracy while maintaining appropriate oversight and compliance with procurement legislation.

1. Current Program Overview

Program Name: Asset Assessment & Technical Documentation development for Capital Projects

Department/Division: Public Works – Facilities & Capital Projects

Legislative Mandate: The program is governed by municipal and provincial procurement requirements that define how engineering services, technical assessments, and manufacturer provided services may be acquired.

County of Dufferin Procurement By-law

- Establishes mandatory competitive procurement thresholds.
- Defines conditions for **non-competitive procurement**, including:
 - Proprietary or specialized goods/services available only from one supplier.
 - Warranty, compatibility, or integration requirements that restrict competition.
 - Situations where only the manufacturer can provide accurate technical data.
- Requires written justification, approval, and documentation for all sole source- awards.

Provincial Procurement Legislation and Guidelines

- *Buy Ontario Act (Public Sector Procurement), 2025:* Establishes a provincial framework for public sector procurement oversight, emphasizing transparency, fairness, and value for money.
- *Ontario Public Sector Procurement Guidelines:* Reinforce responsible management, open competition, and defensible exceptions.
- *Broader Public Sector (BPS) Procurement Principles:* While municipalities are not bound by the BPS Directive, the County aligns with its principles of fairness, openness, accountability, and value for money.

Trade Agreement Considerations

- *Canadian Free Trade Agreement (CFTA)*
- *Canada-EU Comprehensive Economic and Trade Agreement (CETA)* Both allow exceptions for:
 - Technical compatibility
 - Sole supplier situations
 - Warranty protection
 - Proprietary technology

These provisions support the potential use of manufacturer-provided assessments where no equivalent competitive alternative exists.

Program Description

The County currently procures engineering consultants through competitive RFP/tender processes to complete asset assessments, prepare technical drawings, develop specifications, and support capital project planning.

Goals and Objectives

- Ensure accurate, defensible technical documentation.
- Maintain compliance with procurement and asset management regulations.
- Support transparent, competitive procurement.
- Optimize cost, schedule, and risk in project delivery.

Strengths

- Competitive procurement ensures fairness and market pricing.
- Independent engineering expertise.
- Clear audit trail.

Weaknesses

- RFP/tender processes are time consuming.
- Consultants may lack proprietary system knowledge.
- Duplication of effort when verifying manufacturer data.
- Higher cost structures.

Current Delivery Method

Traditional competitive procurement (RFP/tender) for engineering services.

2. Potential Changes

Areas Under Consideration

- Use of manufacturer provided- assessments, drawings, and specifications.
- Establishing sole source- procurement pathways where manufacturer services are proprietary.

Potential Changes

- Reduce reliance on external engineering consultants for proprietary systems.
- Direct engagement of manufacturers for technical documentation.
- Streamline processes and reduce procurement cycles.

3. Key Performance Indicators (KPIs)

Current KPIs

- Time to complete assessments
- Accuracy of technical documentation
- Cost per assessment
- Number of procurement cycles

Impact on KPIs

- Faster turnaround
- Reduced procurement workload
- Improved accuracy for proprietary systems
- Reduced independence of assessments

Data Collection Methods

- Procurement records, project schedules, invoices, manufacturer reports.

Baseline Data

- To be populated from County records.

4. Budget and Financial Analysis

Current Budget Breakdown

- Personnel time
 - Per request for proposal approximately 27.5 hours of staff time is required from procurement, \$1,600
 - Approximately 16.5 hours of Facilities staff time is required in the procurement process, \$1,800

RFP (with some complexity)	Procurement (approx. hours)*	Department/Lead on Project (approx. hours)
Design (set up, back and forth)	6-8	6
• Manager review	1	-
Bids and Tenders (build tables & submission requirements)	2	-
Posted – Live on Bids & Tenders (3 weeks)	-	-
Addendum (questions back and forth, possible consultant involvement)	2	2
• Manager review	1	1
Evaluation (incl. set up spreadsheet/math) * depends on the number of bids received	4-6	4-6
• Manager review	1	-
Award (recommendation, collect req. docs, draft letters)	3	-
Approvals (Department Manager/Council)	1	1
• Manager review	1	1
Interview/Negotiations/demos	3-4	2
• Manager review	1	-
PO	30 mins – 1	30 mins – 1
Kick-off meeting	1	1
TOTAL (hours)	27.5 – 33	18.5 - 21

- Operating expenses
 - Although possible to see savings operationally, focus is on capital projects
- Contracted services
 - n/a
- Capital design costs
 - The capital work plan includes seven possible projects for a total of \$117,500 in engineering related fees

Projected Savings

- Time procurement spends on request for proposal process would be eliminated, \$1,600 of staff time could be redirected to other activities, per project
- Facilities staff time would drop to approximately 8.5 hours, \$900 of staff time could be redirected to other activities, per project

- Total hours saved would vary depending on number of capital projects, with seven projects in the capital work plan this would equate to \$17,500 in potential staff time that can be redirected to other projects
- Potential 20–40% reduction in assessment costs (varies by asset class), 2026 could be between \$25,400 and \$50,800

Cost Benefit- Analysis

Benefits:

- Manufacturer assessments often lower cost or bundled with service agreements.
- Lower cost
- Faster delivery
- Reduced duplication
- Reduced internal procurement workload
- Better alignment with proprietary systems

Costs:

- Loss of independent review
- Potential manufacturer bias
- Need for supplemental engineering

Support Costs

- Procurement, Legal, Finance, IT.

5. Service Delivery Impact

Updated Service

- Hybrid model: manufacturer for proprietary systems; engineering consultants for integration and regulatory review.

Revised Goals and Objectives

- Reduce cost and time
- Improve accuracy
- Maintain independence where required

New Service Delivery Model

- Direct manufacturer service + targeted engineering support.

Impact on Service Recipients

- Faster project initiation
- More accurate specifications

Access and Equity Considerations

- No direct public facing- impacts.

Quality Assurance Measures

- Internal peer review

- Supplemental engineering
- Standardized templates

6. Impact Analysis

Alignment with Strategic Goals

- Supports efficiency, cost control, and streamlined capital project delivery.

Positive Impacts

- Cost savings
- Faster readiness
- Reduced procurement workload
- Better technical accuracy

Negative Impacts

- Reduced independence
- Perception of reduced competitiveness
- Vendor dependency

7. Risk Assessment

Identified Risks

- Financial: manufacturer may recommend replacement
- Operational: limited scope
- Reputational: sole source scrutiny
- Procurement: compliance with by-law

Mitigation Strategies

- Strong sole source- justification
- Hybrid model
- Cost comparison documentation
- Internal review checkpoints

8. Compliance and Regulatory Review

Regulatory Requirements

- County of Dufferin Procurement By-law
- Buy Ontario Act (2025)
- Ontario procurement guidelines
- Trade agreements (CFTA, CETA)

Compliance Status

Manufacturer services may qualify as sole source- when:

- Proprietary
- Warranty dependent

- Only manufacturer can provide accurate data

Legal Implications

- Requires defensible documentation and approvals.

9. Stakeholder Feedback

External/Community Input

- Not applicable.

Internal Feedback

- Facilities: supports faster turnaround
- Procurement: requires strong justification
- Finance: supports cost savings with transparency

10. Change Management

Change Management Strategy

- Communicate rationale, document decisions, train staff.

Stakeholder Engagement Plan

- Procurement, Legal, Finance early in process.

Transition Plan

- Pilot manufacturer led assessments, evaluate results, expand or adjust.

Municipal Program Assessment: Crack Sealing Program

Department/Division: Engineering & Operations Divisions

Executive Summary

This assessment reviews the annual asphalt crack sealing program and evaluates delivery alternatives to support a preservation-first road maintenance approach while improving coordination between Engineering (scope/prioritization) and Operations (execution). This proposal does not change Engineering's role in determining where crack sealing is required through lifecycle asset management practices; it only changes how the work is delivered.

Two options are presented in this review:

- **Option A - Maintain the current contracted delivery model.**
Annual program cost is approximately \$168,900 (including Engineering staff time and operating/fleet costs).
Budget savings: None (baseline).
- **Option B - Transition to full in-house delivery**
Engineering retains technical direction; Operations executes with purchased equipment.
Budget Savings: \$17,200 - Ongoing annual cost is approximately \$151,700 (after year 1 capital purchases), representing approximately \$17,200 in annual operating savings.

Recommendation:

Proceed with Option B - Transition to full in-house delivery to realize ongoing operating savings, improve scheduling control, and strengthen internal preservation capability while maintaining Engineering-led lifecycle decision-making.

1. Current Program Overview

Program Name: Annual Asphalt Crack Sealing Program

Department/Division: Engineering (Program Ownership, Asset Planning)

Legislative Mandate?

Crack sealing supports compliance and prudent asset stewardship under:

- Ontario Regulation 239/02
- Municipal Act infrastructure maintenance obligations
- O. Reg. 588/17 (Asset Management Planning for Municipal Infrastructure)

While not a prescribed activity, it is a recognized preventative maintenance best practice supporting lifecycle optimization.

Program Description:

The Engineering Department currently owns the program from a lifecycle management perspective. Engineering determines:

- Network condition assessment
- Prioritization of segments
- Treatment timing based on AMP modeling
- Quantity and scope annually

Delivery is presently contracted out.

Goals and Objectives:

- Extend asphalt service life per treatment cycle.
- Reduce long-term capital resurfacing demand.
- Improve/maintain pavement condition index trends.
- Aligning with strategic asset lifecycle management.

Strengths:

- Specialized contractor expertise.
- No capital purchase required.
- Fixed annual cost structure.
- Minimal operational disruption.

Weaknesses:

- Limited scheduling flexibility.
- Market pricing volatility.
- Contractor availability risk.
- Reduced integration between field delivery and internal maintenance strategy.
- Missed opportunity to build internal preservation capacity.

Current Delivery Method:

- Engineering defines scope.
- Procurement contracts service.
- Contractor executes.
- Operations provide limited oversight (Contractor storage at Primrose yard for material & equipment.)

2. Potential Changes

Describe areas under consideration (specific programs, activities, projects to be evaluated)

- Reducing or eliminating services/programs
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue (likely the most difficult)

Under the proposed model:

- Engineering would continue to own prioritization and technical direction.
- Operations would assume field execution using internal staff and purchased equipment.

Transition to full in-house execution of crack sealing, supported by:

- Purchase of tar kettle and router
- Staff training
- Integration into summer maintenance programming
- Direct coordination between Engineering (scope) and Operations (delivery)

Historically, Operation crews have performed elements of capital construction during summer months. There is now a deliberate shift toward strengthening maintenance management practices and preventative preservation activities. Crack sealing fits directly within that strategic realignment.

3. Key Performance Indicators (KPIs)

- **Current KPIs:**
 - Km sealed annually
 - Cost per lane-km
- **Impact on KPIs:** How will reduction/elimination change affect performance metrics?
 - Increased responsiveness to identified cracks
 - Better integration between AMP modeling and field execution
 - Reduction in cost per lane-km over time
- **Data Collection Methods:** (e.g., surveys, reports, monitoring systems)
 - Current: Contract Scope/Deliverables
 - Future: CityWide Work Order Management Software
- **Baseline Data:** Existing performance data before change.
 - Km of cracks sealed annually: 57 Km
 - Cost per Km: \$2,400 / Km

** 2022-2025 Historical Averages used for comparative analysis

4. Budget and Financial Analysis

Current Model Budget Breakdown:

Personnel Costs

- Engineering staff time, \$8,000

Operating Expenses

- Fleet related costs (based on OPS standard rates) \$3,500

Contract Services

- Varies annually, 3-year average contracted amount= \$136,780, 2026 budget \$157,400

Capital Expenditures: n/a

Total current model cost = **\$168,900**

Proposed Model Budget Breakdown:

Personnel Costs, include estimated time staff spend on program

- 1 Technologist for approximately 35 hours per year, \$2,700
- Summer student, 35 hours, \$950
- 6 operator crew for 120 hrs (12 working days), \$37,600

Operating Expenses

- Materials (Sealant/Genzoil): \$33,000
- Fleet related costs (based on OPS standard rates), \$9,000
- Equipment maintenance, fuel, insurance etc. , \$30,000
- Ancillary Tools (hoses, shovels, etc.) = \$2,500 (up-front, \$900 per year for replacement)
- Additional Traffic Control Barrels: \$5,000 (up-front, \$1,000 per year for replacement)

Contract Services

- n/a

Capital Expenditures

- Diesel Tar Kettle and Hot Lance= \$125,000 (10yr lifecycle)
- Crack Router = \$18,000 (10yr lifecycle)
 - Total proposed model cost = **\$263,750**
 - Future year cost, including capital replacement = **\$151,700**

Projected Savings: Estimated financial impact.

- Unit cost differential:
 - Year 1: -\$94,850
 - Year 2: -\$77,650
 - Year 3: -\$60,450
 - Year 4: -\$26,050
 - Year 5: \$60,652
 - Year 6: -\$8,850
 - Year 7: +\$8,850

A cost savings of \$17,200 each year resulting in a full realization of capital spend happening in year 7.

Cost-Benefit Analysis:

Costs Introduced:

- Capital investment
 - Benefits:
- Lower near-term unit cost
- Greater scheduling autonomy
- Ease of coordination through internal services only
- Increased asset lifecycle (due to increased ability to crack seal)

- Stronger preventive maintenance culture
- Ancillary job completion (Litter pickup, detailed network inspection)

Support Costs:

- Engineering: Support in providing locations to crack seal each year. No change from current structure.
- Procurement: Support the acquisition of required equipment and materials in accordance with municipal purchasing policies.

5. Service Delivery Impact

- **Updated Service:** (Describe what new service looks like, what programs are being offered, if eliminate mark as "none")
 - Crack sealing executed internally under Engineering-defined scope.
- **Revised Goals and Objectives:** (list revised)
 - Increase preventative maintenance intensity
 - Improve lifecycle performance metrics
 - Strengthening internal preservation capability
- **New Service Delivery Model:** How service will be delivered (e.g., direct service, partnerships, contract out, download, eliminate)
 - Engineering: Scope & Prioritization
 - Operations: Execute
 - Clear accountability split, Engineering the technical authority and Operations becoming the delivery authority.
- **Impact on Service Recipients:** Who will be affected and how?
 - n/a
- **Access and Equity Considerations:** Will reduction/elimination disproportionately affect certain groups?
 - Engineering prioritization ensures network-wide equity based on condition, not visibility or complaint frequency.
- **Quality Assurance Measures:** How will service quality be maintained or transitioned?
 - Standard Operating Procedure aligned with TAC best practices
 - Inspection and productivity monitoring

6. Impact Analysis

- **Alignment with Strategic Goals:** Does the proposed change support municipal priorities and long-term plans?
 - Governance: Identify opportunities to improve governance and service delivery.
 - Support asset management plan
- **Positive Impacts:** Expected benefits (e.g., cost savings, increased efficiency).

- Near term cost savings
- Operational control
- Reduced contractor reliance
- Stronger Engineering – Operations integration
- **Negative Impacts:** Drawbacks or challenges (e.g., reduced service levels, staff reductions, community backlash).
 - Capital cost upfront
 - Reduced summer capacity for discretionary capital support
 - Increased health and safety risk related to product exposure and roadside operations
 - Reduced capacity to support lower-tier crack sealing programs
 - Initial productivity inefficiencies during program ramp-up phase
 - Underutilization of capital investment in years with lower program quantities
 - Increased operational workload on internal staff
 - Risk of equipment downtime or catastrophic failure
 - Ongoing responsibility for maintenance, storage, and lifecycle replacement
 - Loss of contractor specialization and associated efficiency advantages

7. Risk Assessment

- **Identified Risks:** Financial, operational, reputational, or other risks associated with change.
 - Underutilization of equipment
 - Early-stage productivity inefficiency
 - Crew capacity strain
 - Health & Safety exposure (Hot sealant handling)
- **Mitigation Strategies:** Steps to manage or reduce risks.
 - Integrate into formal summer maintenance plan
 - Vendor-led training at unit acquisition
 - Annual cost-per-km tracking
 - Establish a minimum annual Km completion threshold in line with capital lifecycle planning.

8. Compliance and Regulatory Review

- **Regulatory Requirements:** List all applicable municipal, provincial, or federal regulations.
 - Occupation Health & Safety Act
 - Environmental spill management requirements
- **Compliance Status:** Summary of compliance, recent audits, or findings.
- **Legal Implications:** Are there legal risks or obligations if the program is reduced or eliminated?

9. Stakeholder Feedback

- **External/Community Input:** Summary of feedback from residents, community groups, or stakeholders regarding the proposed change.
 - Likely neutral if service levels maintained or improved.
- **Internal Feedback:** Input from department heads, program staff, and other internal stakeholders.
 - Engineering: Supportive due to contract management challenges
 - Operations: Supportive as system is already set up for this type of work
 - Fleet: Neutral as nominal maintenance required

10. Change Management

- **Change Management Strategy:** Outline how reduction/elimination will be communicated and managed.
 - n/a
- **Stakeholder Engagement Plan:** How stakeholders will be informed and involved throughout the process.
 - Group training and discussions
- **Transition Plan:** Steps for winding down or transferring services, including timelines and responsible parties.
 - Procure immediately and begin as soon as practicable.

Municipal Program Assessment: Roadside Guardrail Repair

Department/Division: Operations Division

Executive Summary

This assessment reviewed delivery options for the County's Roadside Guardrail Repair Program. Based on historical repair volumes (approximately 525 m/year) and current unit pricing, the existing hybrid model (minor adjustments in-house; major repairs contracted) is the lowest-cost approach at approximately \$115,200 annually, while also maintaining compliance with modern MASH installation standards through specialized contractors.

Three options were included in this review:

- **Option A - Maintain current hybrid delivery model**
Annual cost: \$115,200
Budget savings: \$12,800/year .
- **Option B - Expand to full contracted delivery**
Annual cost: \$128,000
Budget Savings: Increase to budget at +\$12,800/year versus the current hybrid model (higher ongoing operating cost).
- **Option C: Transition to fully in-house delivery**
Estimated annual cost: \$209,900
Budget savings: Increase to budget at +\$94,700/year versus the current hybrid model, plus additional requirements for specialized installation equipment, training, and inventory management.

The County currently maintains guardrail infrastructure through a hybrid delivery model where minor adjustments are completed internally while major repairs and system replacements are contracted to specialized installers.

Recommendation:

Maintain Option A – Current hybrid delivery model. Analysis of historical repair volumes and contract pricing indicates that the current hybrid approach delivers the lowest effective annual program cost, estimated at approximately \$115,200 per year. Expanding the program to full contracted delivery would increase annual costs to approximately \$128,000, while transitioning to a fully in-house program would increase annual costs to approximately \$209,900 and require specialized installation equipment.

1. Current Program Overview

Program Name: Roadside Guiderail Repair Program

Department/Division: Operations Division (Program Ownership and Delivery)

Legislative Mandate:

Guiderail maintenance supports safe roadway operations and prudent infrastructure stewardship under:

- Ontario Regulation 239/02 – Minimum Maintenance Standards
- Municipal Act infrastructure maintenance obligations
- Occupational Health and Safety Act

Modern guiderail systems must also meet MASH (Manual for Assessing Safety Hardware) requirements.

Program Description:

- The County maintains roadside guiderail systems to ensure damaged safety barriers are repaired following collisions or infrastructure deterioration.
- Typical repair work includes:
 - Replacement of damaged guiderail sections
 - Replacement of posts and hardware
 - Installation of end terminals
 - Alignment corrections following collisions
- Currently, the County uses a hybrid delivery model:
 - Minor guiderail adjustments are completed by Operations crews
 - All major guiderail repairs and replacements are contracted to specialized installers
- This model reflects the increasing complexity of guiderail systems and the need for specialized installation equipment and expertise

Goals and Objectives:

- Maintain safe and functional roadside barrier systems
- Restore damaged infrastructure in a timely manner
- Ensure installations meet modern safety standards
- Deliver repairs in a cost-effective and operationally efficient manner

Strengths:

- Access to specialized guiderail installation expertise
- Contractors possess required installation equipment
- Predictable unit pricing through service contracts
- Internal staff are still able to address minor adjustments quickly

Weaknesses:

- Reliance on contractor availability
- Limited internal capability for major guiderail installation work

Current Delivery Method:

- Minor guiderail adjustments completed in-house
- Major guiderail repairs contracted through tendered unit-rate agreements

2. Potential Changes

Describe areas under consideration Reducing or eliminating services/programs

- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue (likely the most difficult)

The County evaluated whether guiderail repairs could be expanded to include full in-house delivery rather than relying on specialized contractors.

A full in-house model would require:

- Specialized guiderail installation equipment
- Training for MASH-compliant installations
- Inventory management for all guiderail components

This review compares the implications of expanding in-house delivery versus maintaining the current contracted approach.

3 Key Performance Indicators (KPIs)**Current KPIs:**

- Metres of guiderail repaired annually
- Cost per linear metre

Impact on KPIs:

If the County were to move toward full in-house delivery, the likely impact on KPIs would include:

- Increased cost per linear metre
- Increased staff hours required per repair
- Reduced productivity on larger or more complex repairs
- Increased risk of installation deficiencies where specialized system knowledge is required

Data Collection Methods:

Current and future performance can be measured using the following sources:

- Contractor invoices and tendered unit rates
- Internal work order records

Baseline Data:

Average annual guiderail repairs: approximately 525 metres

Current hybrid delivery split:

- Contracted guiderail repair rate:
 - 460 linear meters

- \$245 per linear meter
- Minor in-house adjustments
 - 65 linear meters
 - \$80 per metre

4 Budget and Financial Analysis

Current Model Budget Breakdown:

Personnel Costs

- Minor Inhouse Repairs: \$15,200

Operating Expenses

- Nominal supplies (staples, posts, hand tools, etc.)

Contract Services

- Contracted Repairs: \$100,000

Capital Expenditures: n/a

Total current hybrid model cost: \$115,200

Based on 525 metres per year equates to \$219/m

Proposed Model Budget Breakdown:

Personnel Costs

- Salary and benefit costs for 6 operators at 140 hours plus supervision: \$51,100

Operating Expenses, what expenses can be attributed to this program

- Training: \$4,000
- Fleet Equipment, fuel and maintenance: \$45,000
- Pile Driver Rental Rate = \$15,600
- Materials: \$94,200

Capital Expenditures

- Total proposed in house model cost = **\$209,900**
- Based on 525 metres per year equates to **\$400/m**

Projected Savings:

- Proposed inhouse exclusive model results in an increase cost of approximately \$94,700 yearly.
- Current model is most cost effective

Cost-Benefit Analysis:

Benefits of Current Hybrid Model

- Lowest effective annual program cost
- Access to specialized guiderail installation expertise

- No capital equipment investment required
- Immediate response for minor repairs
- Maintains operational flexibility

Costs Associated with Full In-House Model

- Higher labour and equipment costs
- Specialized training requirements
- Lower productivity for complex installations compared to contractors

Support Costs:

Minimal internal support required:

- Contract administration
- Annual program coordination
- Post-repair inspections

5 Service Delivery Impact

Updated Service: No service change recommended.

Revised Goals and Objectives: No service change recommended.

New Service Delivery Model: No service change recommended.

Impact on Service Recipients:

- No negative impacts expected.
- Maintaining the hybrid model ensures guiderail systems are repaired promptly and installed correctly.

Access and Equity Considerations:

- Repairs are prioritized based on collision damage and safety deficiencies, ensuring consistent service across the entire road network.

Quality Assurance Measures:

- Contractor specifications aligned with MASH installation requirements
- Post-installation inspections by Operations staff
- Unit-rate contract standards

6. Impact Analysis

Alignment with Strategic Goals:

- Maintaining the current delivery model supports:
- Responsible financial management
- Efficient infrastructure maintenance
- Safe operational practices

Positive Impacts:

- Lowest overall cost

- Access to specialized installation expertise
- Reduced operational burden on municipal staff
- Consistent installation quality

Negative Impacts:

- Dependence on contractor availability

7 Risk Assessment

Identified Risks:

- Contractor scheduling delays
- Market price fluctuations

Mitigation Strategies:

- Maintain annual guiderail repair contracts
- Competitive procurement to maintain pricing

8 Compliance and Regulatory Review

Regulatory Requirements: List all applicable municipal, provincial, or federal regulations.

- Ontario Regulation 239/02
- Occupational Health and Safety Act
- MASH roadside safety hardware standards
- Contracted installers specialize in these systems and ensure compliance with modern installation standards.

9 Stakeholder Feedback

External/Community Input: Public expectation is that damaged guiderails are repaired promptly and installed correctly.

Internal Feedback: Operations staff recognize that modern guiderail installations require specialized equipment and system expertise beyond current internal operational capacity.

10 Change Management

Change Management Strategy: No change recommended.

Stakeholder Engagement Plan: n/a

Transition Plan: Continuing with current model

Municipal Program Assessment: Guiderail Vegetation Management

Department/Division: Operations Division

Executive Summary

The current guiderail vegetation maintenance program relies on Operations staff performing mechanical trimming multiple times each growing season. This approach is labour intensive, exposes staff to live traffic environments, and requires repeated maintenance cycles due to rapid vegetation regrowth.

Two options are explored in this report:

- **Option A - Continue current in-house mechanical trimming.**
Estimated annual cost: approximately \$20,000-\$30,000.
Budget savings: None
- **Option B - Transition to annual contracted herbicide spraying.**
Estimated annual cost: approximately \$14,000.
Budget savings: approximately \$6,450-\$17,150 per year (about 31%-55% reduction), depending on the number of trimming cycles otherwise required.

Recommendation:

Option B, based on the combination of lower annual cost, reduced roadside worker exposure, and improved season-long vegetation suppression.

1. Current Program Overview

Program Name: Roadside guiderail vegetation maintenance program

Department/Division: Public Works/ Operations (Program Ownership & Delivery)

Legislative Mandate:

Guiderail vegetation maintenance supports prudent infrastructure management and safe roadway operations under:

- Ontario Regulation 239/02 – Minimum Maintenance Standards
- Municipal Act infrastructure maintenance obligations
- Occupational Health and Safety Act

While vegetation management itself is not prescribed under the Minimum Maintenance Standards, maintaining clear guiderail systems supports safe roadside infrastructure performance and safe worker access during inspection and repair activities.

Program Description:

- The Operations Division performs vegetation maintenance around roadside guiderail

installations to ensure the barrier system remains visible, accessible, and capable of functioning as intended during roadside incidents.

- Currently, vegetation removal is performed in-house using mechanical string trimmers.
- Typical activities include:
 - Manual trimming of vegetation along guiderail segments
 - Multiple maintenance cycles throughout the growing season
 - Crews working directly within the roadside clear zone adjacent to traffic
- Due to vegetation regrowth, the program typically requires 2–3 trimming cycles annually to maintain adequate vegetation control.

Goals and Objectives:

- Maintain clear and visible guiderail systems
- Ensure roadside safety infrastructure remains functional
- Support safe inspection and maintenance activities
- Maintain roadside aesthetics and vegetation control

Strengths:

- Crews are familiar with guiderail locations throughout the network
- Uses existing staff and equipment resources

Weaknesses:

- Requires multiple interventions each growing season.
- High staff exposure to live traffic environments.
- Reduced operational efficiency compared to longer-term vegetation control methods.
- Vegetation quickly regrows between trimming cycles.
- Staff's time diverted from higher priority maintenance activities.

Current Delivery Method:

- Operations crews perform mechanical string trimming
- Work occurs 2–3 times annually
- Traffic control is required during each cycle
- Crews operate within the roadside clear zone adjacent to guiderails

2. Potential Changes

Describe areas under consideration

- Reducing or eliminating services/programs
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue (likely the most difficult)
- Under the proposed model:
 - Guiderail vegetation would be sprayed once annually
 - Vegetation suppression would last the majority of the growing season

- Work would be performed by a licensed vegetation control contractor
- Herbicide spraying provides longer-term vegetation suppression and significantly reduces the number of maintenance interventions required each year.
- This approach is widely used by road authorities as it improves:
 - operational efficiency
 - Worker Safety
 - vegetation control effectiveness

3. Key Performance Indicators (KPIs)

Current KPIs:

- Number of guiderail maintenance cycles completed annually
- Total program cost per maintenance cycle

Impact on KPIs:

Transitioning to contracted spraying is expected to improve several key performance metrics:

- Reduction in annual maintenance cycles (3 cycles to 1)
- Reduction in staff exposure hours to roadside traffic
- Improved vegetation suppression consistency
- Reduced total annual program cost
- Increased availability of staff for higher priority operational work

Data Collection Methods:

Current:

- Internal work planning schedules
- Staff time tracking

Future:

- Contractor invoicing records
- Completion tracking through CityWide / Asset connections

Baseline Data:

Current Mechanical Trimming Model:

- Average cycles per year: 2–3
- Cost per cycle: approximately \$10,000
- Annual cost range: approximately \$20,000 – \$30,000

4. Budget and Financial Analysis

Current Model Budget Breakdown:

Personnel Costs

- 4 equipment operators, 80 – 120 hours per year \$16,800 to \$25,100

Operating Expenses

- Fleet related costs (based on OPS standard rates), \$3,200 to \$4,800

- Equipment related costs \$450
- Trimmer replacement \$800 (every 6 years)

Contract Services: n/a

Capital Expenditures: n/a

Total cost between **\$20,450** and **\$31,150**

Proposed Model Budget Breakdown:

Personnel Costs: n/a

Operating Expenses: n/a

- Road patroller utilized during routine inspections to gauge performance, no additional cost

Contract Services

- Based on approximately 29 km and \$0.48 per metre, annual cost, \$14,000

Capital Expenditures: n/a

Projected Savings:

- Minimum Savings: \$6,450 / yr
- Maximum Savings: \$17,150 / yr
 - This represents a 31%–55% cost reduction annually, depending on the number of mechanical trimming cycles required in a given season.

Cost-Benefit Analysis:

Costs Introduced:

- Contracted vegetation control service

Benefits:

- Lower overall program cost
- Reduced labour requirements
- Reduced roadside worker exposure
- Improved vegetation suppression throughout the season
- Elimination of repeated trimming cycles
- Improved operational efficiency
- More consistent guiderail visibility

Support Costs:

- Minimal internal support required.

5. Service Delivery Impact

Updated Service:

- Vegetation surrounding guiderail infrastructure would be controlled through annual contracted herbicide spraying.

Revised Goals and Objectives:

- Maintain clear guiderail systems throughout the entire growing season
- Reduce repeated vegetation maintenance interventions
- Improve staff safety by minimizing roadside exposure
- Improve operational efficiency of roadside maintenance programs

New Service Delivery Model:

- Contractor: Annual herbicide application
- Operations: Contract oversight and inspection

Impact on Service Recipients:

- No negative impact expected for road users
- Improved guiderail visibility and roadside safety conditions

Access and Equity Considerations:

- Vegetation management is applied uniformly across the road network, ensuring consistent service levels.

Quality Assurance Measures:

- Contract specifications outlining spray coverage requirements
- Visual inspections following application
- Contractor compliance with provincial pesticide licensing requirements

6. Impact Analysis

Alignment with Strategic Goals:

- Improved service delivery efficiency
- Worker safety improvements
- Responsible municipal resource management

Positive Impacts:

- Lower annual operating costs
- Reduced labour demand
- Improved vegetation suppression
- Reduced staff exposure to live traffic
- Improved guiderail visibility and roadside safety

Negative Impacts:

- Reduced direct involvement of internal staff in vegetation removal
- Dependence on contractor scheduling
- Weather conditions may impact application timing

7. Risk Assessment

Identified Risks:

- Contractor availability

- Public perception regarding herbicide use

Mitigation Strategies:

- Use licensed and compliant vegetation management contractors
- Ensure applications follow provincial environmental regulations
- Communicate that herbicide use is targeted and limited to guiderail areas

8. Compliance and Regulatory Review

Regulatory Requirements:

- Ontario Pesticides Act
- Occupational Health and Safety Act
- Environmental Protection Act

Compliance Status:

- Contracted spraying would be performed by licensed pesticide applicators, ensuring full regulatory compliance.

Legal Implications:

- No legal concerns identified provided applications follow approved pesticide regulations.

9. Stakeholder Feedback

External/Community Input:

- Vegetation control around guiderails is generally not visible to the public and is unlikely to generate significant community concern.

Internal Feedback:

- Operations staff recognize the safety and efficiency advantages of reducing repeated trimming cycles

10. Change Management

Change Management Strategy:

- Implementation requires minimal organizational change as the work would simply transition to contracted delivery

Stakeholder Engagement Plan:

- Internal communication with operations staff regarding the shift in delivery model

Transition Plan:

- Implement beginning in the next growing season.

Municipal Program Assessment: Nuisance Beaver Program

Department/Division: Operations Division

Executive Summary

Dufferin County currently administers a nuisance beaver removal program addressing approximately 115 incidents annually across the County at a total cost of approximately \$20,000 per year. However, only approximately 10 incidents annually directly affect County-owned infrastructure, with the majority of program activity addressing impacts to municipal drains and local municipal infrastructure.

Under the Drainage Act, lower-tier municipalities are responsible for the construction, operation, and maintenance of municipal drains through their appointed Drainage Superintendent, indicating that nuisance wildlife impacts affecting those systems fall primarily within the jurisdiction of the local municipality.

Two options are explored in this review:

- **Option A: Maintain the current County-wide program model**

County continues coordinating nuisance beaver removals for both County-owned infrastructure and lower-tier municipal drains/infrastructure.

Estimated annual cost: \$19,500 (approx. \$20,000).

Budget savings: None.

- **Option B: Limit County involvement**

To include incidents affecting County-owned infrastructure only and transition responsibility for municipal drains/local municipal infrastructure to the respective lower-tier municipalities (with removal services continuing to be available through licensed private contractors).

Estimated annual cost (proposed): \$1,740.

Budget savings: \$17,934.

Department Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Nuisance Beaver Management Program

Department/Division: Operations Division (Program Ownership and Delivery)

Legislative Mandate:

- Municipalities are not legislatively required to administer nuisance wildlife management programs. However, nuisance beaver activity can impact public infrastructure including:
 - Roadside drainage systems
 - Culverts and water crossings
 - Municipal roads and rail trails
 - Municipal drainage systems
- Authority to address nuisance wildlife exists under:
 - Municipal Act, 2001 – infrastructure protection
 - Ontario Fish and Wildlife Conservation Act – nuisance wildlife control
- Additionally, issues related to beaver activity affecting municipal drains fall within the legislative framework of the Drainage Act.
- Under the Drainage Act:
 - Lower-tier municipalities are responsible for the construction, maintenance, and repair of municipal drains.
 - Each municipality appoints a Drainage Superintendent, who is responsible for overseeing drainage infrastructure and coordinating maintenance activities.
 - Where beaver activity obstructs municipal drains, the responsibility for addressing those impacts typically rests with the local municipality administering the drain.

Program Description:

Dufferin County currently administers a nuisance beaver removal program that responds to beaver activity affecting:

- County-owned infrastructure, including:
 - County roads
 - Culverts
 - Rail trails
- Municipal drain systems administered by lower-tier municipalities.
- Wildlife removal services are delivered through licensed wildlife contractors coordinated by the County Operations Division.
- Based on historical activity levels:
 - Approximately 115 beaver incidents occur annually across the County
 - Only 10–15 beaver removals annually relate directly to County-owned infrastructure
 - The majority of removals occur in response to municipal requests.
- This indicates that most program activity addresses infrastructure owned and maintained by lower-tier municipalities.

Goals and Objectives:

- Protect public infrastructure from flooding and drainage impacts caused by beaver activity
- Maintain functionality of roadside drainage and culvert systems
- Address obstructions affecting municipal drains

Strengths:

- Established relationships with licensed wildlife removal contractors
- Ability to respond quickly where County infrastructure is impacted

Weaknesses:

- Majority of program activity relates to infrastructure owned by lower-tier municipalities
- Wildlife management is not typically an upper-tier municipal service
- Administrative burden placed on County staff for local municipal issues
- Potential misalignment of responsibilities under the Drainage Act

Current Delivery Method:

- Lower-tier municipalities notify the County of nuisance beaver activity
- The County coordinates licensed wildlife removal contractors
- Contractors perform trapping and removal services
- Costs are funded through the County Operations budget
- The County also responds directly to where beaver activity impacts County-owned infrastructure.

2. Potential Changes

Describe areas under consideration

- Reducing or eliminating services/programs
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue (likely the most difficult)

Option B - Dufferin County is evaluating whether it should continue administering nuisance beaver removal services for lower-tier municipalities, or whether responsibility should be limited to County-owned infrastructure only.

- Under a revised model:
 - The County would continue to address nuisance beaver activity affecting:
 - County roads
 - County culverts
 - County rail trail
 - Lower-tier municipalities would assume responsibility for nuisance wildlife management affecting:
 - municipal drains
 - local municipal roads (Currently in place)
 - local drainage systems (Currently in place)
- This approach aligns responsibility with the municipal authority responsible for maintaining the affected infrastructure.
- A review of practices in comparable Ontario upper-tier municipalities also indicates that regional nuisance wildlife removal programs are not typically administered by upper-tier

governments, with responsibility generally resting at the local municipal level.

3. Key Performance Indicators (KPIs)

Current KPIs:

- Number of nuisance beaver incidents addressed annually
- Cost per incident

Impact on KPIs:

If the County limits the program to County infrastructure only:

- Annual program volume would decline significantly
- County administrative workload would decrease
- Response times for County-owned infrastructure could improve
- Lower-tier municipalities would coordinate wildlife removal for local issues

The change primarily affects program administration, while wildlife removal services would continue to be available through licensed contractors.

Data Collection Methods:

Program activity is currently tracked through:

- Municipal service requests
- Contractor logs and invoices
- Internal Mapping Systems

Baseline Data:

Reported nuisance beaver incidents by municipality:

- Amaranth: 59
- Melancthon: 24
- Grand Valley: 20
- Mono: 9
- East Garafraxa: 3
- Shelburne: 0
- Mulmur: 0
- Orangeville: 0

Total incidents: 115

- Of the 115 incidents, 10 incidents are related directly to County infrastructure

4. Budget and Financial Analysis

Current Model Budget Breakdown:

Personnel Costs

- County staff administration time: \$1,500

Operating Expenses: n/a

Contract Services

- Contracted removals: \$18,000

Capital Expenditures: n/a

Total cost: \$19,500

Proposed Model Budget Breakdown:

Personnel Costs

- County staff administration time: \$230

Operating Expenses: n/a

Contract Services, are any parts of this program contracted out

- Contracted removals: \$1,566 (2025 actual / 115 x 10)

Capital Expenditures: n/a

Total proposed in house model cost = \$1,740

Projected Savings:

- \$17,934 in estimated savings

Cost-Benefit Analysis:

Benefits of limited the program

- Aligns service responsibility with infrastructure ownership
- Reduces County administrative burden
- Reduces annual County program costs
- Clarifies responsibilities under the Drainage Act

Cost Consideration

- Municipal Drainage Superintendents would need to coordinate wildlife removal for municipal drains via the local Municipality

Support Costs:

- Minimal internal support required

5. Service Delivery Impact

Updated Service:

- The County would continue nuisance beaver removal only where County infrastructure is impacted.

Revised Goals and Objectives:

- Protect County infrastructure from beaver-related drainage impacts
- Align wildlife management responsibilities with infrastructure ownership
- Reduce County administrative workload

New Service Delivery Model:

- Dufferin County: nuisance wildlife removal affecting County infrastructure
- Lower-tier municipalities: nuisance wildlife removal affecting municipal drains and local infrastructure
- Licensed wildlife contractors: continue providing removal services

Impact on Service Recipients:

- Lower-tier municipalities would assume responsibility for coordinating nuisance wildlife removal affecting their infrastructure.
- Residents would continue to receive service through their local municipality

Access and Equity Considerations:

- All municipalities retain the ability to procure licensed wildlife removal services directly based on local needs.

Quality Assurance Measures:

- Wildlife removal must be performed by licensed nuisance wildlife contractors in accordance with provincial regulations.

6. Impact Analysis

Alignment with Strategic Goals:

Limiting the program aligns with:

- Clarifying municipal service responsibilities
- Reducing duplication between upper-tier and lower-tier services
- Ensuring services are delivered at the level responsible for the infrastructure

Positive Impacts:

- Reduced County administrative workload
- Lower annual program cost
- Clear alignment of responsibilities under the Drainage Act

Negative Impacts:

- Lower-tier municipalities will need to coordinate wildlife removal directly

7. Risk Assessment

Identified Risks:

- Some municipalities may have limited experience coordinating wildlife removal services

Mitigation Strategies:

- Provide municipalities with existing program & contractor contact information

8. Compliance and Regulatory Review

- Ontario Fish and Wildlife Conservation Act

- Drainage Act
 - Under the Drainage Act, lower-tier municipalities are responsible for maintaining municipal drains through their appointed Drainage Superintendent. Where beaver activity obstructs municipal drains, the responsibility for addressing those impacts generally rests with the municipality responsible for administering the drain.

Compliance Status: n/a

Legal Implications:

- Exposure to unnecessary liability

9. Stakeholder Feedback

External/Community Input:

- Notice to local municipalities would be required prior to modifying the program structure

Internal Feedback:

- Operations staff recognize that the majority of nuisance beaver issues relate to local municipal infrastructure and municipal drains, rather than County assets.

10. Change Management

Change Management Strategy:

- Communicate proposed program restructuring to lower-tier municipalities and provide advance notice of transition.

Stakeholder Engagement Plan:

- Consult with municipalities and Drainage Superintendents to confirm transition timelines.

Transition Plan:

- Notify municipalities of proposed change
- Provide program & contractor contact information

Municipal Program Assessment: Household Hazardous and Electronic Waste Event Days

Department/Division: Waste Services Division

Executive Summary:

The Household Hazardous and Electronic Waste (HHEW) Event Days program provides County residents with scheduled drop-off events to safely dispose of household hazardous and electronic waste. The program operates seven days each year from spring to fall at rotating locations across the County, is delivered through contracted service partners, and is funded through a combination of producer responsibility funding and the tax base.

Three options were explored in this review:

- **Option A – Reduce annual event days (7 to 5 in 2027):**
Reduce two event days to address 2027 budget pressures while continuing the current contracted delivery model.
Budget Savings: approximately \$37,000
- **Option B – Increase offsetting revenue through higher e-waste tonnage:**
Maximize electronics collection at events to increase producer-responsibility funding (\$216/metric tonne).
Budget savings: Using 2025 as an example, 35.42 tonnes generated \$7,650.72; collecting an additional 8 tonnes would add approximately \$1,728. Note: if event days are reduced, maintaining or increasing tonnage may be challenging.
- **Option C – Shift to an alternate service delivery model (e.g., depot-based HHW service):**
Continue exploring longer-term service expansion options identified through the Long-Term Waste Management Strategy Update.
Budget Savings: None - expected to increase program costs

Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Household Hazardous and Electronic Waste Event Days

Department/Division: Waste Services, Public Works Department

Legislative Mandate:

Program Description:

Seven (7) event days are held each year from early spring to late fall. The events are held on Saturdays (8am-3pm) and one or two summer Wednesdays (3pm-8pm). Five different locations are utilized (in Grand Valley, Shelburne, Mulmur, Mono, Orangeville), depending on their availability. The events are open to any residents of Dufferin County. No commercial attendees are permitted. Materials accepted include household hazardous wastes and electronic wastes. The County receives some funding from producers for designated hazardous materials and electronic wastes, and otherwise the cost is from the taxbase.

Goals and Objectives:

The goal of this program is to divert HHW and E-wastes from the residential waste streams. Objectives include; hosting events across the County for accessibility by residents, spreading the dates out as best as possible (depending on the contractor's and host sites availability) over the spring-fall timeframe, having an efficient process as residents flow through the event sites, and promoting the event days to residents through several channels to raise awareness and participation. The County's Long-Term Waste Management Plan (2018) and current Update process includes improving HHW Services. This could include moving to a depot-based system, or increasing the number of HHEW Days. However, both of these options would increase the cost of this service.

Strengths:

Events Days are open to all County residents, and move around to different host locations. The County receives some funding for designated hazardous materials and electronics/electrical equipment, which helps offset some of the costs. Residents consistently divert these materials through the events.

Weaknesses:

- events are seasonal, thus no events are held in the winter season
- host location availability challenges along with event dates available with the contractor (sometimes events can't be spread out geographically and/or date wise)
- during the event season, residents are required to wait between event days
- although the events are open to all residents, some people do not want to drive to a host location that is not near their home
- some of the events are not well attended (i.e. in areas further away from the more populated areas), and some events are very well attended, with wait times (usually first thing in the morning)
- under the current Event Day model, the contractor's site service fees and other set-up costs per event are approx. \$20,000 (not including the materials collected)
- producer funding isn't sufficient for the designated hazardous wastes collected, and additional materials should be designated by the Province (that currently are not, and thus are paid by the County's taxbase)

- although a new service model that includes a depot would be more convenient, there are also considerations around increased costs, finding a suitable location, logistics and approvals

Current Delivery Method:

The HHW service at the events is contracted out to GFL (setting up, helping to unload resident vehicles, sorting and packing the materials, hauling the materials after the event, processing the materials at their hazardous waste facility to reuse, recycle or properly dispose of them in registered facilities). Electronics storage bins at the events are delivered ahead of the event, and picked up afterwards by an electronics recycling organization (EPRA). They also process the electronics at their facility for sorting and shipment to recyclers. The County provides the staff at each event to help unload vehicles and place the e-wastes into the storage bins. The County receives funding per kg of e-wastes collected.

2. Potential Changes

Describe areas under consideration

- Reducing or eliminating services/programs Due to 2027 budget pressures, the County could consider reducing the 2027 events from seven to five for example. This would save approximately \$37,000 in setup fees, staffing and operational costs. This does not include the costs of the hazardous materials collected, which may drop in volume from not being collected at those events, or they may be redirected to the other five event days by residents choosing to attend the other five events.
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign
- and/or technology
- Introducing additional sources of revenue (likely the most difficult) We receive \$216 per metric tonne for E-waste collected at events. Therefore, the more E-waste tonnage we collect, the more funds we receive to help offset County staffing and other costs for the event days. For example, in 2025 we collected 35.42 tonnes of E-waste x \$216 per tonne = \$7650.72. If we collect an additional 8 tonnes (similar to what was collected in 2023), that would be an additional \$1,728.00. However, if events are reduced for 2027, it is unlikely that the County would collect the same or additional tonnage at the five events.

3. Key Performance Indicators (KPIs)

Current KPIs:

HHEW Event Days	2025	2024	2023	2022	2021 (covid)	2020 (covid)
Number of events	7	7	7	7	4	4

Total attendees	2729	3042	2784	2550	2017	2224
Dropoff HHW	2421	2714	2478	2344	1806	1992
Dropoff E-waste	1678	1781	1676	1484	1243	1209
Avg vehicles per event	390	435	397	364	504	556
HHW tonnage	91.73	98.36	94.63	97.58	81.89	85.55
E-waste tonnage	35.42	36.79	43.42	31.59	28.74	30.80

Impact on KPIs:

By reducing the events by two, to host a total of five for 2027, there could be an overall reduction in the number of vehicles that attend the events. However, during the Covid Pandemic (2020 and 2021), even though the number of events were reduced to four events each year (due to contractor availability), the average number of households attending each event was higher than a regular seven event day year. For the four events in each year, variables included they were held on Saturdays only, events were only held in Grand Valley, Mono and Orangeville, and residents were at home during this time and doing home/garage cleanouts (i.e. wanted to get rid of materials they had stockpiled). The wait times were generally higher during these events due to the number of vehicles and that GFL would not unload vehicles due to Covid restrictions. The average tonnage collected per event was also higher during this time. An overall impact of reducing the 2027 events from seven to five events could be less HHW and E-wastes diverted at event days, although residents may decide to attend the five events that are being offered (i.e. higher participation for all the remaining events). Another impact on KPI is potential additional HHW and E-wastes thrown in the curbside waste streams (or illegally dumped) if residents don't keep these materials until the next event day. GFL is supposed to tag and leave if they see these materials in the curbside garbage stream, however sometimes they are hidden.

Data Collection Methods:

Front gate vehicle tallies including types of materials being brought in (HHW and E-waste) and number of vehicles by origin (municipalities), tonnages from invoices (HHW) and tonnages from event reports (E-waste)

Baseline Data: Existing performance data before change. See current KPIs.

4. Budget and Financial Analysis

Current Budget Breakdown:

- Personnel Costs, include estimated time staff spend on program The average personnel costs (seasonal staff) for a Saturday event day is \$1900, and approximately 12-24 overtime banked hours of full-time staff. The average Wednesday evening event has average personnel costs (seasonal staff) of \$660, and approximately 21 overtime banked hours for full time and student staff. The overtime banked is taken off, and any remaining hours are paid out at the end of the year.
- Operating Expenses, what expenses can be attributed to this program Events at the Orangeville Agricultural Society Event Centre sometimes have a rental fee of approximately \$1260, although we do not always receive an invoice. The other sites are municipally owned and do not charge a fee. Portable toilets and eyewash stations are approximately \$320 per event. Two roll off containers for recycling and garbage are approximately \$300, plus approximately \$100 for the garbage disposal per event.
- Contract Services, are any parts of this program contracted out Yes, the HHW setup and collection is contracted out to GFL.

2025 Event Days Costs (Contractor: GFL) and Funding (Designated Materials)

2025 Event Days	Site Setup \$	Materials Collected \$	Number of HHW attendees	Avg cost per vehicle	Approx. funding per event (PCA, AMS, C2R)	Avg. cost per vehicle after funding	Avg kg/ vehicle	
Shelb (April)	\$18000	\$32073.25	431	\$116.18	\$9849.59	\$93.33	42.35	
Mono (May)	\$18000	\$24106.00	430	\$97.92	\$9713.73	\$75.33	33.40	
Grand Valley (June)	\$18000	\$14659.75	242	\$134.96	\$5168.27	\$113.60	36.47	
Mono (July*)	\$15250	\$16898.00	322	\$99.84	\$5946.88	\$81.37	27.54	
Grand Valley (Aug*)	\$15250	\$10916.00	168	\$155.75	\$4568.03	\$128.56	42.13	
Mulmur (Sept)	\$18000	\$17591.00	200	\$177.96	\$5746.71	\$149.22	47.56	
Mono (Oct)	\$18000	\$37987.5	628	\$89.15	\$15617.46	\$64.28	39.12	
<i>Total</i>	<i>\$120500</i>	<i>\$154231.50</i>	<i>2421</i>	<i>\$124.54</i>	<i>\$56610.67</i>	<i>\$100.81</i>	<i>38.37</i>	

*Wednesday evening (5 hours) vs Saturdays (7 hours)

Capital Expenditures: None

Projected Savings: Estimated financial impact.

Per event	Site Set-up costs	Approx. Personnel (seasonal staff) costs	Approx. Operating costs	Approx. Total Savings
Saturday	\$18000	\$1900	\$720	\$20620
Wednesday	\$15250	\$660	\$720	\$16630
			Total for two events	\$37,250

*plus staff overtime banked (mainly taken off, sometimes paid out)

Cost-Benefit Analysis:

Decreasing the number of event days by two in 2027 will save some costs, however it will also decrease the accessibility of HHW services for residents throughout the year. Although the utilization of the remaining five events would hopefully improve with additional attendees, wait times may also increase.

Support Costs: None

5. Service Delivery Impact

Updated Service:

- Two Saturday spring events, one Wednesday summer evening event, two Saturday fall events. All events held in more centralized locations to encourage participation.

Revised Goals and Objectives:

New Service Delivery Model:

- Continue with current model – service contract for HHW and E-wastes.

Impact on Service Recipients:

- Residents will be affected by less event days to attend, and potentially less non-centralized locations.

Quality Assurance Measures:

- Types of materials collected will remain the same, and GFL will be expected to continue staffing the events appropriately for efficient vehicle flows through the event sites.

6. Impact Analysis

Alignment with Strategic Goals:

- No, it does not support long-term plans as the LTWMS includes an option to increase the HHW Services in the County (i.e. through additional events and/or a depot), not decrease events.

Positive Impacts: Cost savings for 2027 by reducing by two events (for example).

Negative Impacts:

- reduced service level to residents in an already short seasonal program
- less events for seasonal staff to work at, which becomes a potential issue with recruitment
- potential community backlash for decreasing number of events and the potential removal of those locations with less participation (i.e. rural locations like Mulmur) to focus on more central locations for greater access

7. Risk Assessment

Identified Risks:

- Reputational risk, as some residents have asked for expanded services, not a reduction.

Mitigation Strategies:

- Any change to the events would be included within our yearly communication plan, to explain that this event day reduction would be implemented in 2027 as a one-year cost-savings measure, while the County continues to explore the future of HHW services.

8. Compliance and Regulatory Review

Regulatory Requirements:

- HHW Days are operated under a Mobile Certificate of Approval held by GFL, and issued by the Ministry of Environment, Conservation and Parks.

9. Stakeholder Feedback

External/Community Input:

- The proposed change for 2027 has not been discussed with stakeholders. However, overall the feedback from residents through the recent LTWMS Update engagement activities (survey and focus groups) have shown interest/support for extending the HHEW services (i.e. implementing a depot). There have been comments that the lines at some of the event days are long (which depends on the time of day and location), and that time in between events is inconvenient.

Internal Feedback:

- Some County Councillors have also given feedback about expanding the HHEW services to include additional convenient options such as additional events and/or a depot.

10. Change Management

Change Management Strategy:

- A communication plan will be developed, including the use of social media, newspaper ads, the County webpage, and the County's Waste App for promotion of the event days.

Stakeholder Engagement Plan:

- An explanation that the events were reduced due to cost-cutting for the 2027 budget would be given.

Municipal Program Assessment: Outreach and Education Programs

Department/Division: Waste Services Division

Executive Summary:

Waste Services' outreach and education programs support the County's Long Term Waste Management Strategy by promoting proper waste sorting and behaviour change to increase diversion and reduce landfill pressures. Current activities include outreach campaigns, staff-supported community event displays (approximately 20 events/year), zero-waste event support through lending and set-up of multi-stream waste stations, and in-school education (90 presentations reaching 2,200+ students and staff in the 2024–2025 school year).

Four options were explored within this review:

- **Option A: Maintain current service levels (status quo)**

Continue outreach campaigns, event attendance/displays, waste-station support for events (including larger events), and school presentations.

Budget Savings: None. (maintains current overtime and operating costs).

- **Option B: Reduce staff attendance at community events and/or scale back displays and giveaways**

Attend fewer events and prioritize those with the highest engagement value; reduce promotional giveaways where feasible.

Budget savings: up to approximately \$14,000/year in staffing. Potential additional \$2,000/year for event materials and \$2,500–\$5,000/year for tent replacement/giveaways.

- **Option C: Reduce or eliminate waste-station support for events**

Reduce the number of events supported with waste stations or discontinue the program entirely.

Budget savings: tied to reduced staff time and event-related materials.

- **Option D: Reduce or eliminate school presentations; reallocate educator time**

Reduce the number of in-school presentations or discontinue them and shift staff capacity to other diversion initiatives (e.g., curbside setout studies, compliance, campaigns, customer service/admin support).

Budget savings: No direct savings (no overtime); \$16,000/year in regular staff time that

could be *reallocated* to other Waste Services priorities if school programming is reduced or eliminated.

Recommendation:

Proceed with Option A – Maintain current service levels. While targeted reductions could generate limited direct savings—primarily by avoiding weekend/evening overtime for events—eliminating or substantially reducing these activities could negatively affect diversion outcomes and contribute to higher long-term disposal costs as landfill capacity tightens.

1. Current Program Overview

Program Name: Waste Services Outreach and Education Programs

Department/Division: Waste Services, Public Works Department

Program Description:

- Outreach and education programs/initiatives support the County’s Long Term Waste Management Strategy, including diversion goals of sending less garbage to landfill, by educating/promoting/encouraging residents and program users to sort properly and change their behaviours (i.e. use their green organics bins etc.)
- Outreach initiatives include;
 - Campaigns
 - Events – i.e. displays and waste stations
 - Community presentations
- Education initiatives include;
 - School presentations – proper sorting, and specialized sessions on organics, textiles/clothing, waste reduction etc.

Goals and Objectives:

- The overall goal is for outreach and education programs to support the LTWMS, to divert wastes from landfill
- Objectives include;
 - Engage with residents and program users through outreach campaigns and events, to encourage behaviour change and proper sorting
 - Educate school-aged children about the waste system, how to participate at school and at home, and to encourage behaviours that will become the norm (i.e. waste diversion and waste reduction behaviours that will benefit the waste system now and into the future)

Strengths:

- Approximately 20 various community events are attended by Waste Services staff each year, including municipal events such as Mono Winterfest, library events, Orangeville Home Show, Grand Valley Duck Race, the Blues & Jazz Festival, Ribfest, County Compost Giveaway Days in conjunction with community events such as tree seedling and plant sales, etc.

- Waste Stations are available for events to utilize to sort wastes. The County provides the stations equipment and supplies, and the events provide the volunteers to staff the stations and sort the wastes (i.e. organics, recycling and garbage). For example, the Blues & Jazz event has six waste stations, and the Ribfest event has four waste stations, and the County helps to set up the stations at these larger events
 - The LTWMS has a goal to encourage events to be “zero waste”
- In the 2024-2025 school year, there were 90 school presentations given to over 2200 students and staff by the County’s Waste Reduction Educator

Weaknesses:

- While the waste stations model is successful for events to sort their wastes for diversion from landfill, it is time consuming for County staff to help set up the stations at larger events
- Having County staff involved in the set up at larger events, however, ensures the equipment is set up and taken down properly, and the events’ volunteers understand the sorting system
- The large events are well attended, however engagement with attendees is somewhat limited (some attendees are not from the area, or do not engage as much as some other specific events around the community)

Current Delivery Method:

- Outreach and education programs/initiatives are directly delivered by Waste Services staff
- The Outreach and Communications Coordinator designs and creates all outreach and communications materials, and coordinates the County’s campaigns and involvement with events etc.
- The Waste Reduction Educator’s time is 50% with Waste Services (the other 50% is with Emergency Management). Of their 50% with Waste Services, approximately 25% of their time is spent on education and outreach activities, and the other 25% is spent on projects/campaigns, customer service and admin support

2. Potential Changes

Describe areas under consideration

- Reducing or eliminating services/programs
- Could consider reducing or eliminating attendance at events by Waste Service staff, which would reduce the amount of overtime (which is banked or paid out to staff)
- Could consider reducing or eliminating the waste station support for events
- Could consider reducing the number of school presentations or eliminating this program, and reallocating staff time to other outreach/engagement activities
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue (likely the most difficult)

3. Key Performance Indicators (KPIs)

Current KPIs:

- Number of events attended
 - approximately 20 events per year, including Compost Giveaway Days (which are within another program review)
- Number of attendees County staff engage with at events
 - Have not historically kept statistics on this, however at the recent Home Show, Waste Services staff spoke with 314 people over the weekend
 - Number of school and community presentations

Impact on KPIs:

- If no longer attend events, or reduce the number that staff attend with a display, then there is an impact to engagement with the public (e.g. for behaviour change efforts)
- Waste stations support at events (especially the two large events – Blues & Jazz and Ribfest) helps divert wastes from landfill
 - without County waste station support, these events may not have multi-waste sorting stations, that would ultimately impact their waste diversion efforts (i.e. some may choose to only have garbage containers)
- if reduce or eliminate dedicated school presentations, the County loses the opportunity to directly educate students and staff in hands-on classroom activities to help change behaviour and foster long-term habits at home for waste diversion. If behaviours don't change, then the County continues dealing with issues of increasing garbage (and dwindling landfill space, higher tipping fees etc). The Waste Reduction Educator position also supports admin/projects/customer service, which these areas are further supported when we don't have presentations booked (there are waves of interest from the schools, usually around Waste Reduction Week and Earth Month)

Data Collection Methods:

- Tracking of event attendee stats can be implemented in 2026
- School and community presentations are tracked

Baseline Data:

- Approximately 20 events per year are attended by Waste Services staff
- In 2024-2025 school year, 90 school presentations were given and over 2200 students and staff were reached directly (i.e. in-person)

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs:

- Waste Services event coordination admin time – regular work week logistics set-up
- Waste Services event time – not including Compost Giveaway Days (which are part of a separate program review), the seven events that were attended in the evenings and/or weekends in 2025, had 294 staff overtime hours equaling approximately \$14,000 in wages and benefits
 - Accrued time is banked as overtime, and is taken off or paid out
- Regular staff time is utilized for school presentations, prep time, resource development etc. In 2024-2025, staff time equated to approximately \$16,000 in wages and benefits. If this time was not spent on the school programming, it could be reallocated to other waste diversion/reduction outreach initiatives within Waste Services

Operating Expenses:

- Approximately \$2,000 is in the annual budget for materials such as event supplies, bags for sorting wastes at events, gloves etc.
- Approximately \$2500-\$5000 is in the annual budget for replacement of event tents, giveaways for promotions/engagement at events that relate to our programs (i.e. reusable straws and cutlery, small sewing kits etc. that link to our waste diversion and reduction goals). These items are used in display activities, to engage attendees to learn about waste diversion and the County’s programs

Capital Expenditures: None

Projected Savings:

- For Waste Services staff, the events are mainly on weekends, so the approximate 294 hours of overtime would not be worked (and either banked for time off or paid out). The savings would be approximately \$14,000 for wages and benefits if events were eliminated
- For education programming, the staff time is during the regular day (no overtime). If school presentations were reduced or eliminated, the staff time could be reallocated to other outreach activities to continue County efforts for waste diversion and reduction initiatives (i.e. such as curbside setout studies and compliance)

Cost-Benefit Analysis:

Although some costs could be saved, several benefits are lost;

- Event support through waste stations helps the event organizers to properly sort the event’s wastes, while being a reminder to attendees about the importance of waste diversion (i.e. sort at home, sort in public)
- County staff attending events with displays helps to educate/promote/encourage residents and program users to sort properly and change their behaviours by having direct conversations with them. This is especially important for those people who do not use social media
- Directly educating young people and staff in hands-on classroom activities helps to change behaviours and fosters long-term habits at home for waste diversion. If behaviours don't

change, then the County continues dealing with issues of increasing garbage (and dwindling landfill space, higher tipping fees etc,) into the next generation

Support Costs: None

5. Service Delivery Impact

Updated Service:

The options for events could be; status quo (continue with events), reduce the number of events (and have to choose which to attend), or eliminate attendance at events. Giveaways could also be reduced

- The options for waste stations could be; status quo (continue with lending waste stations equipment to events, and helping larger events to set up/tear down), reduce the number of events with waste stations support, or eliminate the waste stations program
- The options for school presentations could be; status quo (continue with school presentations), reduce the number of presentations, or eliminate school presentations and reallocate regular staff time to other waste diversion/reduction initiatives

Revised Goals and Objectives: (list revised)

New Service Delivery Model:

- The services would continue to be a direct service by the County, unless there are community organizations available to undertake some of the work (which may involve fees)

Impact on Service Recipients:

- If waste stations at events are no longer supported, then these events will need to determine their own waste management sorting options, which may result in contaminated waste streams, or no diversion options (i.e. the event organizers may decide to have garbage containers only)
- If event displays are reduced or eliminated, then direct communication/engagement between County staff and residents/program users will be impacted
- Students and staff would be impacted if school presentations were eliminated, as this direct engagement encourages waste diversion efforts at the school, and at home

Access and Equity Considerations:

- Event attendees that do not get their information online for example

6. Impact Analysis

Alignment with Strategic Goals:

- No, reduced or eliminated programs does not support the County's LTWMS and Update, which looks to encourage waste diversion and reduction, in addition to behaviour change. Outreach and engagement programs/initiatives are in place to work towards these goals, especially diversion from landfill now and into the future. If waste generation continues to

rise, additional funds will be required for disposal fees and disposal capacity will need to increase

Positive Impacts:

- There would be some cost savings by reducing or eliminating event waste stations, events displays and school presentations
- County could determine specific events to attend that would provide the best opportunities for public engagement vs staff time

Negative Impacts:

- Event organizers would likely be unsupportive of a change to the waste station program, especially as they want the waste management at their events to run smoothly with a waste station format
- Reduced or eliminated opportunities to visit students will impact engagement with this demographic of our community. Teachers who book the presentations will likely be disappointed if they aren't available, as these in-person sessions instill proper sorting habits and knowledge in the students

7. Risk Assessment

Identified Risks:

- Potential disengagement of event organizers if the waste station program is eliminated, which may lead to no diversion options at events (i.e. garbage containers only)

Mitigation Strategies:

- Event organizers could set up their own waste stations (if their budgets permit) to continue the sorting options, if the County decides to eliminate the waste station program

8. Compliance and Regulatory Review

Regulatory Requirements: None

Compliance Status: None

Legal Implications: None

9. Stakeholder Feedback

External/Community Input:

- There has been no feedback from event organizers or schools about potential changes, as they have not been brought forward to them
- Within the fall 2025 LTWMS Update survey, of 539 respondents to a question about "How do you prefer to be informed of waste related programs and information?", 20% indicated that presence at community events (e.g. booths, displays, markets, education institutions, recreational facilities etc.) was one of the options preferred

Internal Feedback:

- Outreach and education programs/initiatives are a cornerstone of the County's work on waste diversion and reduction

10.Change Management

Change Management Strategy:

- Waste Services staff would communicate any changes to the specific stakeholders involved with the programs

Stakeholder Engagement Plan:

- Emails would be sent to event organizers, letting them know of the decision (i.e. to eliminate waste stations support)
- Emails would be sent to the schools, informing them of the decision (i.e. eliminating or reducing school presentations)

Transition Plan:

- Waste Services staff would let event organizers know that waste stations support is no longer occurring if they are eliminated. If events are interested in starting their own waste stations, Waste Services staff will help give them logistics details

Municipal Program Assessment: Compost Giveaway Days

Department/Division: Waste Services Division

Executive Summary:

The Compost Giveaway Days program is a County-run outreach initiative where staff host about seven events per year (often alongside existing community events like farmers' markets, Earth Day activities, and tree seedling sales) and provide residents with free finished compost—generally up to one blue box worth.

The program's main purpose is to "close the loop" on composting by showing residents a tangible benefit of participating in the green bin and yard waste programs: organics and yard waste are processed into finished compost that residents can then use in their gardens/yards. County staff also use the events to engage and educate residents about organics diversion and related waste programs.

Four options were considered in this review:

- **Option A – Continue program (status quo):**
Maintain 7 Compost Giveaway Days annually in conjunction with existing community events to support outreach and "close the loop" messaging on organics diversion.
Budget savings: None (ongoing annual cost maintained).
- **Option B – Reduce number of giveaway days:**
Hold fewer events beginning in 2027 (requires selecting which host communities/events would continue).
Budget savings: Partial savings dependent on the number of events reduced
- **Option C – Eliminate giveaway days:**
Discontinue the program beginning in 2027.
Budget savings: approximately \$3,750 annually
- **Option D – Alternate delivery model (e.g., bagged compost):**
Shift from bulk giveaways to bagged compost distribution.
Budget savings: None expected; may increase costs due to bagging and transporting skids to event sites.

Recommendation:

Proceed with Option A - continue the Compost Giveaway Days program because the potential savings are relatively low (about \$3,750/year if eliminated) compared to the community engagement and organics-diversion education benefits the events provide.

1. Current Program Overview

Program Name: Compost Giveaway Days Program

Department/Division: Waste Services, Public Works Department

Legislative Mandate (if applicable): None

Program Description:

- Compost Giveaway Days have been a long-standing program whereby the County holds approximately seven events per year
- Events are held in tandem with other events (e.g. Farmer's Markets, Earth Day events, municipal Tree Seedling sales, Agricultural Society plant sales etc.) The only municipality that hasn't hosted a compost giveaway day is East Garafraxa
- Bulk compost is purchased from Alltreat Farms in Arthur, where the County's yard waste is taken for processing
- Public Works Operations staff haul the compost from the processing site to the Primrose Operations Centre, where there is a dedicated small rolloff bin that the County previously purchased. This bin is then moved to each event location for residents to take compost, and then removed after the event with the leftover compost. Larger events like the Orangeville Farmer's Market is given a load of compost that is tipped directly onto the host's parking lot

Goals and Objectives:

- The goal of this program is to "Close the Loop" on composting, by giving interested residents finished compost for use in their gardens and yards.

Objectives include;

- Promoting "closing the loop" on composting to educate residents about the cycle of using the green bin and yard waste programs for organics and yard wastes, and then the materials are processed into finished compost for use on gardens
- Providing giveaways of vegetable seeds (usually donated through the Composting Council of Canada) to encourage residents to use their finished compost to support the "Plant a Row – Share a Row" program, in support of the local food banks
- The County's Long-Term Waste Management Plan (2018) and current Update process includes initiatives to encourage green bin usage and understanding the composting process for greater engagement and participation by households

Strengths:

- The program is well utilized by residents, who are allowed to take one blue box worth of compost to mix in with their regular soil at home

- During COVID, the giveaway days were cancelled. We had numerous calls about it, as many people understand the benefits of using compost for their gardens and yards
- Some of the events, such as the Orangeville Farmer's Market, have no compost left at the end of the 5-hour event
- Combining the giveaway days with existing events is beneficial, as it helps with being at an event that is already drawing in residents, especially as the events are based around the environment, plant and tree seedling sales, Farmer's Markets etc.
- Engagement between Waste Services staff and participants is high at these events
- With the addition of the rolloff containers, leftover compost can be used at other event days, helping to not require additional compost and trips back to Alltreat for more supply. Previously (many years ago) bulk compost was only left at four centralized locations per year, and the compost piles did not always dwindle down quickly, or some residents would bring a trailer and take far more than what was allowed after the event was over

Weaknesses:

- There is a charge for the compost, although not a large amount
- Staff and haulage (equipment) time is required;
 - Waste Services staff arrange the logistics and attend the events
 - Public Works Operations staff pick up the bulk compost from Alltreat Farms in Arthur, and then deliver the compost to the various events throughout the spring (bulk or in the rolloff)

Current Delivery Method:

- The compost is purchased from the County's yard waste processor, Alltreat Farms
- The delivery of the compost to the various event sites is completed internally by the Public Works Operations team

2. Potential Changes

Describe areas under consideration

- Reducing or eliminating services/programs
 - Could consider reducing the number of Compost Giveaway Days for 2027
 - Could consider eliminating the Compost Giveaway Days altogether for 2027
- Providing services using an alternate delivery method
 - Could consider a different model, such as bagged compost, however this may incur more costs with bagging and haulage of skids to event sites
- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue (likely the most difficult)

3. Key Performance Indicators (KPIs)

Current KPIs:

- Seven events are held each year at the following locations;
 - Amaranth tree sale
 - Mulmur tree sale
 - Mono tree sale
 - Shelburne Agricultural Society Plant Sale
 - Grand Valley Agricultural Society Plant Sale (during Duck Race weekend)
 - Melancthon Earth Day and litter clean-up event
 - Orangeville Farmer’s Market
- We do not have stats on the number of residents that take the compost and visit our display tent, however overall the events are well attended and compost is taken for use. We can track the number of compost takers at the events in 2026.

Impact on KPIs:

- By reducing or eliminating the events, the number of people engaged about “closing the loop” on composting will decrease or be eliminated
- This is a time where staff can engage residents about using their green bins for their organics especially, and help mitigate any issues they may be having

Data Collection Methods:

- Tracking of stats can be implemented in 2026
- Review of calls to the County (through the customer service inquiry log) could be completed to determine the number of inquiries about compost giveaway days

Baseline Data:

- Approximately 47 cubic yards of finished compost was distributed in 2025 at compost giveaway days

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs, include estimated time staff spend on program

- Waste Services admin time – regular work week hours for event logistics organization
- Waste Services event time – 55 hours of overtime at 7 events = approximately 8 hours total per event (with one or two staff) equaling approximately \$2,850 in wages and benefits
 - Accrued time is banked as overtime, and either taken off or paid out
- Public Works Operations staff compost pick-up and delivery time – 28 regular daytime hours over the 7 events were logged by Public Works Operations staff, which equates to approximately \$1250 in regular wages and benefits. 28 hours of vehicle equipment time were also logged (to haul the bulk compost), with the vehicle equipment (internal) costs being \$4,200.

Operating Expenses:

- Regular display items that are taken to all Waste Services events (e.g. event tent, giveaways, information). The cost associated with these items is covered in other promotion areas. such as Waste Services Guides etc.)

Contract Services:

- 2025; purchased 47 cubic yards of compost x \$18.00 per cy = \$846
- 2024; purchased 44 cubic yards of compost x 18.50 per cy = \$814

Capital Expenditures: None

Projected Savings:

- The amount of finished bulk compost required would depend if the program was reduced or eliminated. If eliminated, it would be around \$900 per year in savings
- For Waste Services staff, the events are mainly on weekends, so the approximate 55 hours of overtime would not be worked (and either banked to take off, or paid out). The savings would be approximately \$2,850 of staff overtime, and Public Works Operations staff, their regular time would be reallocated to other weekday tasks and the equipment time would also be reallocated

Cost-Benefit Analysis:

- The program is relatively low cost, and gives an outreach opportunity to engage residents. A direct product (finished compost) from their waste sorting/management from home (e.g. green bin, yard waste) is available for them to use at their home
- These events are also held in the smaller local municipalities in addition to the larger ones, hence giving an outreach opportunity that is generally limited in the smaller areas (i.e. there aren't very many events in the smaller municipalities to attend)

Support Costs:

- Public Works Operations – see "Personnel Costs"

5. Service Delivery Impact

Updated Service:

- The options could be status quo (continue with events), reduce the number of events (and have to choose who would host) or eliminate all the giveaways

Impact on Service Recipients:

- The residents who pick up the compost for their gardens will be impacted, and the residents who see the promotions for the events (i.e. the promotions are meant to advertise the events and help "close the loop" on composting by making the link between using the organics diversion programs and the benefits of finished compost)

Access and Equity Considerations: No

6. Impact Analysis

Alignment with Strategic Goals:

- No, the County's LTWMS and Update looks to encourage green bin usage and understanding the composting process for greater engagement and participation by households

Positive Impacts:

- There would be some relatively small cost savings by reducing or eliminating the giveaway days

Negative Impacts:

- The locations/events that host the giveaway days would not benefit from having another draw to their event (i.e. the Compost Giveaway Day)
- Residents who pick up compost have expressed the benefit of this finished product for their garden, and are happy to "get some of the compost back" from using the County's organics diversion programs
- When the County was not allowed to host events during Covid, there were residents that were very disappointed to not receive compost

7. Risk Assessment

Identified Risks:

- Potential disengagement of some residents and location/event hosts if the program is eliminated, that find the program beneficial

Mitigation Strategies:

- Determine if residents can purchase compost themselves from Alltreat or other locations, however as the quantity at events is up to two blue boxes, it is a small amount (and residents that want a larger quantity already have to purchase it themselves from a supplier)
- Event locations could purchase finished compost themselves to host a giveaway, if the County decides to eliminate the program

8. Compliance and Regulatory Review

- Does not apply

9. Stakeholder Feedback

External/Community Input:

- There has not been feedback from locations/event hosts about a potential change as it has not been brought forward to them

- Within the fall 2025 LTWMS Update survey, of 544 respondents that were asked if they used or were aware of Compost Giveaway Days – 22% were not aware, 56% were aware but haven't used it, and 22% had used the program

Internal Feedback:

- Although the events are close together (i.e. late April to early June) which makes it a busy season for County staff, the residents who attend are very happy to get compost and to engage with our staff

10.Change Management

Change Management Strategy:

- Waste Services staff would place the information on the Waste Services webpage, and staff would let residents know if they called in with inquiries
- It would have to be decided if this would be communicated through the Waste App and social media (these are channels that are used for announcing the giveaway days), so they potentially could be used to announce reductions or elimination

Stakeholder Engagement Plan:

- Emails would be sent to the location/event hosts, letting them know of the decision

Transition Plan:

- Steps for winding down or transferring services, including timelines and responsible parties
Waste Services staff would let host locations know that the events are no longer occurring if they are eliminated. If host locations are interested in obtaining finished compost themselves for an event (led by them), Waste Services staff will give them the purchase and logistics details.

**Municipal Program Assessment:
Collections Condo Garbage Rebate Program**
Department/Division: Waste Services Division

Executive Summary

County has operated the Collections Condo Garbage Rebate Program since 2013 (inherited from the Town of Orangeville). The program currently serves 11 buildings (496 units) and provides an annual rebate to help offset private garbage collection costs for condo residents who do not receive County curbside garbage service; participation requires organics and recycling diversion.

This review explores three options:

- **Option A – Continue program (implement 2026 budget fee structure):**
Maintain the rebate and implement the updated 2026 structure that aligns the per-unit rebate with the single-family residential garbage curbside collection cost per stop (approximately double the historical amount; total program cost approximately \$25,000 annually). Budget savings: None
- **Option B – Continue program at historical rebate level (pre-2026 budget):**
Revert to \$25 per unit per year (approximately \$12,400 annually).
Budget savings: approximately \$9,900 (relative to the 2026 budget amount).
- **Option C – Eliminate program: Discontinue the rebate**
Budget savings: approximately \$25,000 (relative to the 2026 budget amount).

Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Waste Collection Rebate for Residential Condominiums (Condo Rebates)

Department/Division: Waste Services, Public Works Department

Program Description:

- County inherited the Condo Rebate program from the Town of Orangeville in 2013 when the County assumed waste management. Orangeville undertook the program for approximately 12 years prior to this. Hence the program has been operating for 25 years in total
- The purpose of the program is to give condos a rebate for their waste collection if they are using a private collector (not the County's curbside collection program). They must

participate in the County's green organics cart program and Circular Material's recycling program to qualify

- The reason for the program has been that residential condos pay residential taxes, and the County does not collect dumpsters from condo building garbage rooms (i.e. these buildings do not receive curbside garbage collections)
- The rebate is \$25 per unit per year, or the cost of the private collections (whichever is less)
- One of the local Property Managers, who oversees nine of the buildings, said the \$25 rebate per unit has not increased since the program's inception, and the buildings' private garbage collections costs have increased substantially
- the 2026 budget, the rebate amount was updated, however has not been implemented yet due to this program assessment

Goals and Objectives:

- The goal of the residential condo rebate program is to provide a garbage rebate to condo units, that do not use the curbside collection system and require private garbage collection
- Objectives include;
 - Encouraging the use of diversion programs within multi-residential condo buildings by requiring organics and recycling separation, to qualify for the annual garbage collection rebate

Strengths:

- There are 11 residential condo buildings with 496 units that are on the condo rebate program
- The program has been operating for 25 years, with the County operating it for 13 of those years

Weaknesses:

- The \$25 per unit rebate has not changed in the past 25 years

Current Delivery Method:

- The current model is to rebate funds to the residential condo buildings, for them to use towards their private garbage collection, as they do not use the County's curbside collection program

2. Potential Changes

Describe areas under consideration

Reducing or eliminating services/programs

- To reduce costs, the program could be eliminated, or the fee adjustment approved in the 2026 budget could not be implemented
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign

- and/or technology
- Introducing additional sources of revenue (likely the most difficult)

3. Key Performance Indicators (KPIs)

Current KPIs:

Year 2025	Number
Condo buildings on the rebate program and participating in green cart and blue cart diversion programs	11
Number of units (condo apartments)	496

Impact on KPIs:

- If the program was eliminated, the number of participating buildings would be zero and some of the buildings may choose not to participate in the County’s diversion programs
- If the funding for the program was reduced, the number of participating buildings would likely stay the same

Data Collection Methods:

- Annual condo rebate forms submitted by the Condo buildings, required for County approval

Baseline Data:

- 11 condo buildings and 496 units

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs:

- Waste Services staff review the annual forms from the Condo buildings and submit a cheque request form to Finance, which is approximately 3 hours of regular time and \$200 of wages and benefits.

Operating Expenses:

- The original amount of \$25 per unit x 496 units = \$12,400 annually
- The 2026 budget amount has a new structure;
 - rebate per unit aligns with the GFL curbside collection fee for garbage (per stop), that is adjusted each year. This works out to be approximately double the amount per unit
 - for the 2026 budget, this is approximately \$25,000. As the yearly price is adjusted for CPI, then the rebate per unit would also be adjusted
 - additional units may be added with any new condo buildings that decide to apply to the program

Contract Services

- The green organics carts are collected on the residential curbside collection routes by GFL
- The blue recycling carts are collected on the residential curbside collection routes by Circular Materials (as multi-residential locations are under the blue box transition regulation)

Capital Expenditures: None

Projected Savings:

If the program is eliminated or the rebate amount is reduced, the projected savings are the following:

Options	Savings
Eliminate the condo rebate program (2026 budget - new fee structure)	\$25,000
Revert to pre-2026 budget amount (to \$25 per unit = \$12,400)	\$9,900

- Time spent by Finance staff to process the payment of the cheque requisitions would be reallocated towards other tasks
- Time spent by Waste Services staff (approximately 3 hours) to administer the program would also be reallocated to other tasks

Cost-Benefit Analysis:

- Condo residents pay residential taxes. The program was put in place to help offset their private garbage collection costs, as Orangeville and then the County did not collect curbside garbage in dumpsters from their garbage rooms
- The cost is relatively small, however the benefits are large as the program requires these buildings to recycle and to also divert organics

Support Costs:

- Finance processes the cheque requisitions for the buildings, as prepared by Waste Services

5. Service Delivery Impact

Updated Service:

- Either the program could stay status quo, be eliminated, or revert to the previous rebate per unit

Impact on Service Recipients:

- The residents in these condo buildings have seen an increase in their private garbage collections costs. By eliminating or reducing the rebate, they would not be receiving rebates that would help cover these costs

- The new fee structure looks to have the condo units receive the same amount of rebate that it costs the County to service single-family households on the curbside garbage routes

Access and Equity Considerations:

- Reduction or elimination of the condo rebates will impact the residents of these condo buildings, who are residential ratepayers

Quality Assurance Measures:

- If the program is eliminated, the buildings may or may not choose to continue diverting organics and recyclables from landfill.

6. Impact Analysis

Alignment with Strategic Goals:

County’s Long-Term Waste Management Strategy and Update are prioritizing waste reduction and waste diversion. Supporting residential condo buildings with their private garbage costs encourages them to also participate in the recycling and organics diversion programs

Positive Impacts:

- Continuing the rebate program helps reduce the private garbage collection costs of condo ratepayers, as the County does not provide curbside dumpster service
- Recycling and organics diversion programs in these buildings continue to divert these materials from landfill

Negative Impacts:

- Condo ratepayers would not be in support of eliminating or reducing the annual rebates, as many of the buildings and property managers have asked about an increase to the original \$25 per unit rebate

7. Risk Assessment

- **Identified Risks:** Financial, operational, reputational, or other risks associated with change.
 - Potential reputational risk if condo ratepayers are unhappy with an elimination or rebate reduction
- **Mitigation Strategies:** Steps to manage or reduce risks.
 - Explain to the condo ratepayers why the program was changed if that is the decision of Council

8. Compliance and Regulatory Review

- **Regulatory Requirements:** List all applicable municipal, provincial, or federal regulations.
- **Compliance Status:** Summary of compliance, recent audits, or findings.
- **Legal Implications:** Are there legal risks or obligations if the program is reduced or eliminated?

9. Stakeholder Feedback

- **External/Community Input:** Summary of feedback from residents, community groups, or stakeholders regarding the proposed change.
 - Condo ratepayers and some property owners have asked for a rebate amount adjustment, which was included in the 2026 budget
 - There has been no feedback on the potential elimination of the rebate program, as it has not been discussed with them
- **Internal Feedback:** Input from department heads, program staff, and other internal stakeholders.
 - Condo rebate program has been long-standing to offset the costs of private collections, as the County does not provide dumpster collection services. It is a relatively low-cost program, and is a benefit to requiring diversion programs in the participating condo buildings

10. Change Management

- **Change Management Strategy:** Outline how reduction/elimination will be communicated and managed.
 - Waste Services staff would inform the condo buildings and property managers of the reduction/elimination of the annual rebates, and the reason behind the decision (e.g. budget)
 - The condo rebate form would be taken off the County website
- **Stakeholder Engagement Plan:** How stakeholders will be informed and involved throughout the process.
 - The stakeholders (i.e. condo ratepayers, boards etc.) would be informed and County staff would be available for any questions/inquiries from them
- **Transition Plan:** Steps for winding down or transferring services, including timelines and responsible parties

**Municipal Program Assessment:
IC&I Recycling Collections and Processing**
Department/Division: Waste Services Division

Executive Summary:

This assessment reviews the County’s Industrial, Commercial & Institutional (IC&I) recycling collections and processing service, which transitioned to a dedicated route on January 1, 2026 to maintain recycling diversion for small-to-medium IC&I locations under the municipal contract with GFL. The report considers service level and funding alternatives and summarizes the associated budget impacts.

Three options were explored in this review:

- **Option A: Continue the dedicated IC&I recycling program (status quo).**
Budget savings: None
- **Option B: Implement partial user-pay cost recovery to offset collection costs.**
Budget savings/revenue offset: approximately \$56,000/year if applied to all 485 locations, or approximately \$46,000/year if applied to businesses only (excluding non-profits/charities). Note: administrative effort estimated at 65–80+ hours/year and about \$4,500–\$5,400 in staff time.
- **Option C: Eliminate the IC&I recycling program.**
Budget savings: approximately \$135,000/year in contract costs (with diversion and service impacts to participating IC&I locations).

Recommendation:

For the consideration of Council.

1. Current Program Overview

Program Name: Industrial, Commercial & Institutional (IC&I) Recycling Collections and Processing

Department/Division: Waste Services, Public Works Department

Program Description:

- County provides waste services to interested small and medium-sized IC&I locations (e.g. non-profits, businesses, institutions and municipal facilities), despite not being mandated to do so.
- Since 2013, eligible interested locations have been included in curbside garbage, organics, and recycling collection, following residential routes and Waste By-law limits.

- Effective January 1, 2026, the County has continued a dedicated IC&I recycling program, as these locations are no longer eligible for residential recycling collection under the Circular Materials transition. This service helps prevent recyclables from being landfilled, particularly for organizations that would find it economically challenging to continue with private recycling collection services. The program currently serves 485 locations with weekly recycling collection using blue carts (existing sites retain current carts capacity; new sites are capped at four carts).
- Currently the IC&I recycling costs are included in the waste related portion of the tax levy, which is paid by all taxpayers (residential and IC&I).

Goals and Objectives:

- The goal of this program is to continue helping small to medium sized IC&I locations to divert recyclables from the garbage stream through municipal-led cost-effective and convenient collections.
- Objectives include;
 - maintaining a dedicated IC&I contract with GFL for recycling collections and processing, that provides an economy of scale for costs
 - maintaining the County's IC&I registration list (database) for program management and logistics
 - the County's Long-Term Waste Management Plan (2018) and current Update process includes supporting IC&I locations with waste diversion/reduction and promotion/education

Strengths:

- County's current contract pricing with GFL for curbside collections is reasonable, given that many other municipalities have reported significant jumps in quoted pricing from their collection contractors and have decided to discontinue their services. This pricing could change with the next curbside collection contract (expires in 2030)
- A dedicated IC&I collection program provides service to small-medium sized IC&I locations that would experience higher costs for private collections of recyclables
- Tonnage diverted from landfill so far in 2026 - 19.66 tonnes in January, and 34.39 tonnes in February

Weaknesses:

- Province did not include IC&I recycling in the Blue Box Transition Regulation, which has ultimately led to the elimination of collection and processing efficiencies with IC&I collections on residential routes.
- Cost of the IC&I recyclables collections and processing is borne by both IC&I and residential taxpayers.
- County does not have its own transfer station or recycling depot, and GFL's private transfer station has now implemented a price per bag of recyclables (it is no longer free of charge for dropoff).

Current Delivery Method:

- The County contracts out the collection and processing of IC&I recyclables to GFL. County staff deliver the blue carts and IC&I branded stickers for the carts to the registered participating locations.
- The program helps small-to-medium IC&I locations divert recyclables from landfill, and many of these locations would find private recycling collection and processing economically challenging without the municipal program

2. Potential Changes

Describe areas under consideration

Reducing or eliminating services/programs

- Reduce the program to include only a set amount of carts (e.g. four or less, regardless if a location had more than this amount pre-transition. This would require County staff time to remove extra carts that are already at existing participant locations. This scenario would likely decrease tonnages collected while collection costs would remain the same as it's a fee per stop (location) per week
- Eliminate the program
- Providing services using an alternate delivery method
- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue
 - County could develop/implement a partial cost recovery model for the IC&I recycling program
 - Municipalities such as the City of Sudbury apply an annual user fee (\$123 in 2026) for businesses, while exempting charities and non-profits
 - Fees cover IC&I recycling collection services, are indexed to CPI, and are billed annually with defined payment and cancellation terms. Initial carts are included, and additional fees apply for cart replacements
- A similar partial cost recovery model for the County could offset program costs. For example, recovering curbside collection costs would equate to approximately \$115 per location annually, with an approximate cost recovery per year of :
 - \$56,000/year (including all locations)
 - \$46,000/year (businesses only, non-profits excluded)
- Cart replacement fees could also be introduced (approx. \$100 per cart; approximately \$3,000 annually), though this would shift from the current County-owned cart model
- Administrative impacts should be considered, with estimated annual staff time costs of approximately \$4,500 (staff wages and benefits) and added pressure on Finance staff resources, to prepare and follow-up on invoices
 - This approach would recover collection costs only. Expanding fees to include processing would require a more complex, cart-based pricing model and additional administrative effort

3. Key Performance Indicators (KPIs)

Current KPIs:

- As of March 2026, 485 locations are registered on the program. The County's calculation was approximately 433 in previous years
- The average tonnage collected per month in 2026 so far is 27 tonnes (an average from January and February)
- Previous estimations were approx. 8 tonnes per month (under 100 tonnes per year) based on a percentage of IC&I locations vs residential locations calculation that was previously used when both streams were co-collected

Impact on KPIs:

Without County support, recyclables from small-medium sized IC&I locations risk ending up in landfill due to inconvenience or private services being cost prohibitive by users

Data Collection Methods:

- County's registration process has had 485 locations register (as of March 2026) as a user of the program
- IC&I locations that are still using a blue box or blue bags, or a blue cart without an IC&I sticker, are oops stickered by GFL to inform them of the registration process for continued collection service (i.e. they are not collected until they registered and have blue carts). GFL sends the County this list frequently to follow up with these locations. The number of non-registered participants is low at this time, after a full rollout was initiated and undertook from summer/fall 2025-winter 2026

Baseline Data:

Using the percentage of IC&I locations the County thought were participating based on previous contact with locations (433) vs the number of residential locations, the County calculated that approximately 1.67% of stops were IC&I locations (non-eligible for Circular Materials residential program). Applied against the total recyclables collected by CM (that included until December 31st 2025 residential and IC&I locations), this worked out to be 94.05 tonnes of recyclables allocated to IC&I in 2025. For 2026, the amount is more than expected per month thus far (January and February). Using an average of January and February's actual weights, the estimate for the year now would be approximately 324 tonnes.

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs

- Regular staff time in 2025 and into winter 2026 for registration of existing and new IC&I locations, cart and sticker deliveries. This is starting to slow down

- Program maintenance after this time, with some staff time allocated for administration, cart replacements and new carts to new locations, with staff time equating to approximately 0.25 FTE (approximately 9 hours a week between a co-op student and collections/customer service support)

Operating Expenses

- Blue Carts – new and replacement carts annual budget is approximately \$25,000 .
- Most economical quote now requires a full tractor trailer shipment of approximately 600 carts at a time, however this number of carts would be expected to last for a few years and be spread out over two budget years

Contract Services

- Actual costs are tracking higher than budget so far in 2026
 - Contract services for curbside collections and processing through GFL is approximately \$135,000 (based on year to date projected tonnages for processing in 2026)
 - The initial collections and processing budget for this program was approximately \$60,000, which included estimated tonnage projections (i.e. based on estimations within the previous residential/IC&I program where tonnages were not split out)

Projected Savings:

- If a user fee (for partial cost recovery) is enacted, the following is an example of the revenue that could be accrued to help offset program costs;
 - \$56,000 (all locations)
 - \$46,000 (businesses only, excluding non-profits)

Cost-Benefit Analysis:

- IC&I locations still have access to the garbage and green bin programs (although less locations participate in each). If the IC&I recycling program was eliminated, it can be expected that some recyclables would be thrown in the garbage stream. If a partial user fee was implemented to recover some of the costs, some locations may decide to not participate, that may also result in some recyclables being thrown in the garbage
- Waste Services and Finance staff time would need to be allocated to tasks such as invoicing and payment follow-up, which would place some burden on these teams

Support Costs:

- Finance staff time to process invoicing of user fees, approximately 67 - 81 hours, \$4,500 to \$5,400 of staff time (wages and benefits)

5. Service Delivery Impact

- **Updated Service:**

- An updated service would implement a partial recovery model, to recover the annual IC&I recycling collection costs for participating IC&I locations (either businesses only, or all locations including non-profits)
- **New Service Delivery Model:** How service will be delivered (e.g., direct service, partnerships, contract out, download, eliminate) The collection and processing of IC&I recyclables would continue to be contracted out to GFL
- **Impact on Service Recipients:** Who will be affected and how?
 - IC&I (business) locations already contribute towards the waste related portion of the tax levy, in addition to residential taxpayers. A partial user fee would be an additional cost for the IC&I location, however if the County eliminated the service altogether, the cost of private recycling collections would be far higher for these locations
- **Access and Equity Considerations:** Will reduction/elimination disproportionately affect certain groups?
 - Yes, either elimination or a partial user fee would especially affect small businesses, and non-profit organizations and charities (especially if non-profits and charities are not exempt from an annual user fee)
- **Quality Assurance Measures:** How will service quality be maintained or transitioned? If the IC&I collection service continues, then the service quality will remain the same

6. Impact Analysis

- **Alignment with Strategic Goals:** Does the proposed change support municipal priorities and long-term plans?
 - County's Long Term Waste Management Strategy Update looks to help support IC&I locations with waste diversion and reduction from landfill
- **Positive Impacts:** Expected benefits (e.g., cost savings, increased efficiency).
 - If begin a user fee for partial cost recovery, then revenues would help offset the collection fees for the program (for example)
- **Negative Impacts:** Drawbacks or challenges (e.g., reduced service levels, staff reductions, community backlash).
 - IC&I locations would likely not be support of a user fee, however if the program was eliminated completely, there would likely be a larger backlash by these users, and a higher cost to these locations for private recycling collections

7. Risk Assessment

- **Identified Risks:** Financial, operational, reputational, or other risks associated with change.
 - Financial risks include; potential non-payment of user fees by some locations for example and the need for follow up for these non-complying locations

- In the case of Sudbury, they indicated there are only a few locations a year that don't comply and are taken off the program
 - Operational risks include; County-GFL logistics of removal of non-complying locations from the collections list and removal of the County's recycling carts
 - Another risk is reputational, as IC&I locations will likely not be in support of a partial user fee
- **Mitigation Strategies:** Steps to manage or reduce risks.
 - Determine best strategy for setting up an annual user fee invoicing and payment system
 - Develop a communication plan to explain why a partial user fee was enacted (if Council decides to implement this model)
 - For example, a partial user fee is to help keep the program operating and sustainable (budget-wise)

8. Compliance and Regulatory Review

- **Regulatory Requirements:** List all applicable municipal, provincial, or federal regulations. The County is not obligated to provide waste collections for IC&I locations, however has been providing the service for 13 years, and even longer by local municipalities pre-County waste assumption in 2013.
- **Compliance Status:** Summary of compliance, recent audits, or findings.
- **Legal Implications:** Are there legal risks or obligations if the program is reduced or eliminated?

9. Stakeholder Feedback

- **External/Community Input:** Summary of feedback from residents, community groups, or stakeholders regarding the proposed change.
 - IC&I locations have registered to be on the recycling program – however there has not been community input into this potential change to a partial user fee system
- **Internal Feedback:** Input from department heads, program staff, and other internal stakeholders.
 - Preliminary discussions with Finance indicate that an annual invoice process for IC&I locations could be enacted, however there would be some burden on Finance staffing resources (approximately 67-81 hours per year)
 - Time required for Waste Services staff to inform the locations of the change, and follow up with non-compliant locations (e.g. those that don't pay their partial user fee)
 - During the initial IC&I registration process (summer-fall 2025) most locations did not respond to the County right away, and a significant

amount of County staff time was required to follow up with locations to get them to register

10. Change Management

- **Change Management Strategy:** Outline how reduction/elimination will be communicated and managed.
- **Stakeholder Engagement Plan:** How stakeholders will be informed and involved throughout the process.
 - County's registration list (database) includes addresses, email addresses and phone numbers for the registered locations, which would be used to communicate with them (e.g. emails and letters)
 - Several notifications would likely need to be sent to ensure each affected IC&I location was aware of the change (for example – the implementation of an annual partial user fee)
- **Transition Plan:** Steps for winding down or transferring services, including timelines and responsible parties. If the County decided to eliminate the IC&I recycling program, then Waste Services staff would inform the program participants of this decision and answer any questions. The locations could decide to secure private collection services on their own, create a collective (for some potential economy of scale on a contract), or take their recycling to GFL's transfer station for a fee.

Municipal Program Assessment: Garbage Bag Tag Revenues

Department/Division: Waste Services Division

Executive Summary:

The garbage bag tag program (in place since 2013) provides residents and small/medium IC&I an option to set out more than the weekly one-bag limit, while encouraging diversion. Waste Services costs continue to rise due to CPI-related increases in collection and disposal; the report explores adjusting the bag tag fee to help offset system costs and potentially encourage better sorting.

Two options were explored in this review:

- **Option A - Maintain Current Program (Status quo):**
Maintain the current \$2 bag tag fee and existing delivery model.
Budget savings: None
- **Option B - Increase fee:**
Increase the bag tag fee from \$2 to \$3.
Budget savings: Revenue impact +\$40,000-\$70,000/year in additional revenue if sales volumes remain the same.

Recommendation:

To proceed with Option B (increase the fee from \$2 to \$3) to help offset rising Waste Services costs and encourage more diversion, with an estimated +\$40,000/year additional revenue if sales volumes remain the same (and noted potential of \$70,000 over the current budget based on recent actuals vs. budget).

1. Current Program Overview

Program Name: Garbage Bag Tags Revenue

Department/Division: Waste Services, Public Works Department

Legislative Mandate (if applicable): None

Program Description:

- County has a one garbage bag/container limit per week. For any additional bags/containers placed at the curb, a County garbage bag tag must be affixed. These tags are \$2 each.
- The cost has been \$2 since the County assumed waste services in 2013.
- The cost helps to cover the cost of collections, disposal and administration of the garbage program.
- Tags are available from the County municipal office (in-person) or can be purchased on-line (and the tags are sent by mail). There are several vendors throughout the County as well,

whereby the County sells the tags to them for \$1.90, and the vendor can sell them for \$2 each (i.e. the vendor keeps 0.10 cents per bag tag). These include retailers, municipal offices and facilities.

Goals and Objectives:

The goal of this program is to provide garbage system participants with an option to set out more than one bag/container of garbage if they choose to on their collection day, while encouraging waste diversion by having a low garbage bag limit and a fee for any additional bags (i.e. \$2 bag tag).

Objectives include;

- Maintaining a list of community vendors that sell the bag tags on the County's behalf, in addition to maintaining the availability of on-line purchases through the County.
- Encourage waste program users to utilize the waste diversion programs that are available to them, to help reduce the amount of garbage they are generating and requiring collection.

Strengths:

- There are approximately 31 locations throughout Dufferin County that sell garbage bag tags, that include vendors, municipal offices and facilities.
- The County also provides an online purchase option.

Weaknesses:

- Completing a scan of other municipalities, there is a variety of prices that are charged for garbage bag tags across the province, that are determined based on their local circumstances
- The County's bag tag fee has not been reviewed since the County assumed waste services from the local municipalities in 2013
- The vendor's revenue of 0.10 cents per bag tag also has not been reviewed
 - County's costs for collections and disposal increase each year, and extra garbage that is set out further adds to the disposal costs

Current Delivery Method:

- A printing company prints the numbered bag tags, and the County sells the bag tags directly to purchasers, in addition to vendors that sell them through their offices/stores.
- County also distributes bag tags at no charge for exemptions, such as registered accessory units (i.e. apartments in houses), diaper exemptions (for two or more children using diapers under the age of four), health exemptions etc. A form is filled out by the requesting party for these exemptions to be reviewed, verified and approved by Waste Services staff.

2. Potential Changes

Describe areas under consideration

- Reducing or eliminating services/programs
- Providing services using an alternate delivery method

- Implementing productivity enhancements through process redesign and/or technology
- Introducing additional sources of revenue (likely the most difficult)
 - Increase the price of bag tags
 - Current fee is \$2 per bag tag. It could be adjusted to \$3 for example

3. Key Performance Indicators (KPIs)

Current KPIs:

Year 2025 – Bag Tags	Number
Bag tags sold to vendors in 2025 (for them to sell to customers at their locations)	50575
Bags tags sold through online orders	1520
County front desk purchases	808
Bag tags issued for exemptions	6100
Exemption “sets” given out per year	159

Year 2025 – garbage tonnages	
Garbage	7979 tonnes (7,979,000 kg)
Approx garbage bags - based on an average of 6.20 kg per garbage bag (determined from waste audits)*	1,286,594

*note: County’s weight limit per garbage bag is 20 kg. Waste audits were mainly conducted on one bag per household in the audit areas per week (only some tagged (extra) garbage was set-out by audit households and included in the audits)

Impact on KPIs:

- By increasing the garbage bag tag fee, the number of bag tags sold per year may decrease if customers (residents, program users) decide to further sort their garbage and use diversion programs, instead of purchasing bag tags for additional garbage bags

Data Collection Methods:

- Curbside collection tonnages
- Waste Audit data from 2019-2020 and 2024-2025
- Staff and finance records for number of orders, exemption forms etc.

Baseline Data:

- Approximately 52903 bag tags were sold in 2025 by vendors and the County

4. Budget and Financial Analysis

Current Budget Breakdown:

Personnel Costs

- Waste Services staff time for filling online bag tag orders
- Finance staff time for filling vendor bag tag orders
- Delivery time of vendor bag tag orders

Operating Expenses

- \$2.00 online bag tag order administration fee (covers mailing and credit card fees) charged to customers x approximately 152 online orders = \$304 in cost recovery

Contract Services

- The printing of the garbage bag tags is contracted out. The budgeted amount is approximately \$6,000, for approximately 1.5 years worth of bag tags.

Capital Expenditures: None

Projected Savings:

Projected revenues if the bag tag price was increased to \$3 per bag tag (from the existing \$2 per bag tag):

- The current budget is \$80,000 in projected revenues from bag tag sales. The revised budget would be \$120,000 in projected revenues with an increase to the bag tag fee
 - it should be noted that actual bag tag revenue has been around \$100,000 per year, which would equate to \$150,000 in revenue with an increase to the bag tag fee. This would equate to an increase of \$70,000 over the current budget

Cost-Benefit Analysis:

- Increased garbage bag tag revenues would help offset more costs of the waste services programs
- By increasing the price per bag tag, it may also encourage some program users to properly sort their garbage so they don't need an extra bag (thus decreasing the number of extra bags generated, and the number of bag tags purchased)
- Fee to drop off a garbage bag at GFL's private transfer station has recently risen to \$6.32 per bag

Support Costs:

- Finance supports Waste Services by filling the vendor bag tag orders and creating invoices where required

5. Service Delivery Impact

Updated Service: Updated garbage bag tag program would see the price increase from \$2 per bag tag, to \$3 per bag tag

Impact on Service Recipients:

- Those customers (program users such as residents and small-medium IC&I locations) would see a financial impact, depending on how often they are purchasing bag tags for extra garbage. However, if they took their garbage to the GFL transfer station, the cost to drop off garbage would be even higher per bag.

Access and Equity Considerations:

- An increase in bag tag fees would especially impact low-income groups

Quality Assurance Measures:

- It is assumed that the bag tag vendors who currently provide the service of selling the tags, will continue. The County will also continue selling the tags in-person at our front desk, and through online orders.

6. Impact Analysis

Alignment with Strategic Goals:

- County's Long-Term Waste Management Strategy and Update are prioritizing waste reduction and waste diversion. A change to the bag tag fee could encourage a decrease in the number of bag tags sold, due to greater diversion of materials from the garbage stream

Positive Impacts:

- Potential increased revenues if bag tag fees are increased to \$3, and number of bag tags sold stays relatively the same
- Increased revenues will help offset annual rising costs in Waste Services, including collections and disposal pricing due to annual CPI increases
- Potential increased waste diversion if people sort their garbage more effectively to avoid the need for extra garbage bags

Negative Impacts:

- Some backlash could be expected from customers if they're not in support of a bag tag price increase
- May see more illegal dumping, due to the bag tag increase

7. Risk Assessment

Identified Risks: Financial, operational, reputational, or other risks associated with change.

- Potential reputational risk if program users are unhappy with the bag tag fee change

Mitigation Strategies: Steps to manage or reduce risks.

- Explain to program users why there is a fee change

8. Compliance and Regulatory Review

- N/A

9. Stakeholder Feedback

External/Community Input:

There has not been feedback from bag tag users/program users, as this potential change has not been brought forward to them

Internal Feedback:

The bag tag fee has not been updated since 2013. Waste Services costs increase each year, especially due to CPI increases on the collection/disposal contract. Increasing the bag tag fee would help encourage further diversion of wastes from the garbage stream, and also generate some additional revenue to help offset costs in the 2027 budget and beyond

10. Change Management

Change Management Strategy:

Waste Services staff would inform the bag tag vendors of a fee adjustment in advance of the change

- information would be placed on the County's webpage and other outreach channels to inform customers/program users, and explain the benefits of the change (i.e. waste diversion and sustainable financial decision-making)

Stakeholder Engagement Plan:

The vendors (stakeholders) would be informed and County staff would be available for any questions/inquiries from them. The County would tell them the date of the fee change, so they could work towards changing their payment systems (i.e. change the rate in their cash registers from \$2 to \$3 and remind them that there is no tax applied to this fee)