

COMMITTEE OF THE WHOLE (WORKING SESSION) AUGUST 28, 2001

WORKLOAD MANAGEMENT AND REPORTING SYSTEM

Recommendation

The City Manager is recommending that the following report respecting a Workload Management Reporting System be received and that the processes to be undertaken for implementation be endorsed.

Purpose

To obtain Council support for the allocation of resources (internal clerical staff and management time – no additional monies)

Background - Analysis and Options

This report is a follow-up to a Council direction of January 29, 2001 emanating from the deliberations of the Budget Sub-Committee:

“That the City Manager establish a workplan, in consultation with senior management, to ensure the timely, effective, and efficient implementation of all approved capital projects and that the workplan be brought to a Working Session no later than the beginning of the second quarter”. (emphasis added).

The Work Plan was completed, as required, and the process for reporting on “approved capital projects” was considered by Council and endorsed.

The second quarter results of the approved capital projects Work Plans have been reported on the Committee’s August 28, 2001 Working Session Agenda.

In a letter addressed to the City Manager under date of August 15, 2001 by Councillor Bernie Di Vona, the Councillor requests clarification as to the motion of Vaughan Council (of January 29, 2001) for a “workplan” to be provided.

As can be seen from the extract of the Council as printed above, Council specifically requested a workplan respecting “approved capital projects”. It did not, at that time, request the workplan to include “citywide/corporate-wide” projects.

Notwithstanding that the initial direction of Council did not include a workplan to include citywide/corporate-wide projects it is timely and appropriate to do so; consequently, I have outlined below a framework for a Workload Management Reporting System that would pick up all the major and significant projects, programs, and delegations over and above capital projects being undertaken by Staff throughout the organization.

As a starting point, please find attached to this Report a copy of a letter that I have forwarded to Senior Staff requesting a complete review of our existing Deferred List as at the end of Council business in June and forwarded to Council accompanying the August 27, 2001 Council Agenda.

As outlined in my letter, I have asked staff to categorize each item into one of four different groups as follows:

- a) terms that would normally be expected to be classified as a measurable project and of a relatively long term nature;
- b) matters that are deemed to be relatively short term responses to Council/Committee requests for information or action that can be cleared relatively quickly (within a 3 month period) providing resources and information are readily available;
- c) projects that are listed but are dependent on information, responses or action by third parties outside of the control of the Administration or have been listed for “bring forward” memo purposes to be assessed or re-assessed at a later date; and
- d) projects that have been completed and/or with the passage of time have become redundant always keeping in mind that we must conserve our staff resources to undertake projects and programs that have tangible and positive results for the municipality.

Items identified by Senior Staff as being measurable both in terms of timeliness and results will then be plotted onto a Workload Management Reporting spreadsheet (similar but not identical to the approved capital projects Work Plan) and results will be reported quarterly. The target date for the period ended September 30, 2001, resource availability being the determinant factor for reaching this target.

Staffing resources that have been utilized by the Director of Reserves and Investments to tabulate the approved capital projects Work Plan will be retained to construct and model the Workload Management Reporting System. Until this project and its processes have been developed, reviewed and accepted, management and co-ordination of the project will be directed by the City Manager. The City Manager will retain the ongoing quarterly reporting responsibilities to Council in consultation with Senior Staff and the Directors.

Given that the nature, scope and definition of many of the projects, programs and delegations that emanate from Council or Senior Staff to the Administration it has to be recognized that measurement of progress and/or timeliness for process work can be much different than that for project work (i.e. capital budget items) consequently, the measurement criteria may be different depending on that nature, scope and definition of the work to be accomplished.

It is my intention to bring the first rough drafts of this Workload Management Reporting spreadsheet to upcoming Working Sessions so that Council Members can be aware of not only progress on the job but make input into the structure of the reporting processes to ensure that it not only provide the information Council Members require but is resource efficient as well.

Conclusion

A Workload Management Reporting System for projects, programs and delegations other than approved capital budget projects can be a valuable management tool for both Senior Staff and Council Members.

Attachments

Letter dated August 24, 2001 – Mayor & Members of Council only

Report prepared by:

Scott Somerville

Respectfully submitted,

Scott Somerville
City Manager