

Operating Impacts from Capital Projects

Service Area	Project	Project Name	Operating Impact Description	2025 Operating Impacts	2026 Operating Impacts
Fleet Management	FLT422	Additional Two (2) Building Inspection Vehicles	Annual software costs for unit tracking.	650	700
Fleet Management	FLT423	Additional By-Law Vehicle	Annual software costs for unit tracking.	-	300
Total Operating Impacts for Fleet Management				\$650	\$1,000
Information Technology	IT146	Digital Services	Annual software costs.	-	25,000
Information Technology	IT157	Mobile Worker	Includes hosted services and cellular service costs, as well as transfers to the hardware replacement reserves.	23,280	23,280
Information Technology	PLN101	Cloudpermit Development Application Portal	Annual software costs.	-	90,000
Total Operating Impacts for Information Technology				\$23,280	\$138,280
Total Operating Impacts to be added to budget				\$44,614	\$213,408



Appendix E: Comparison Data



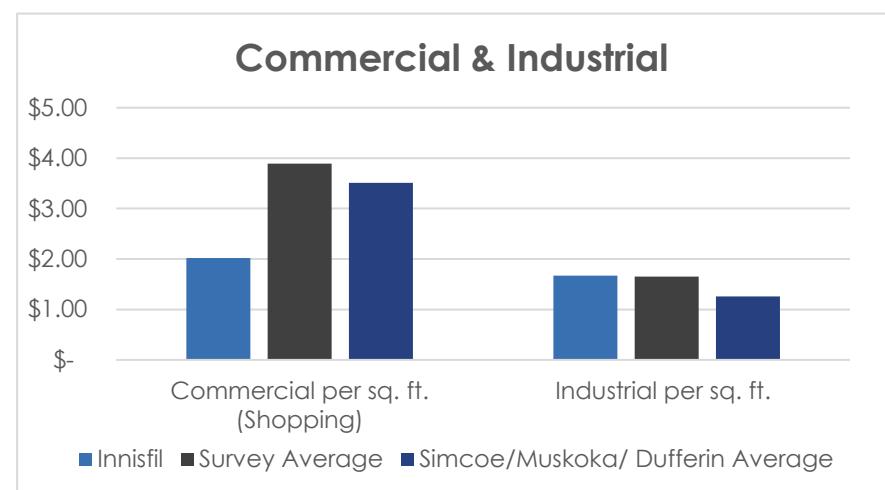
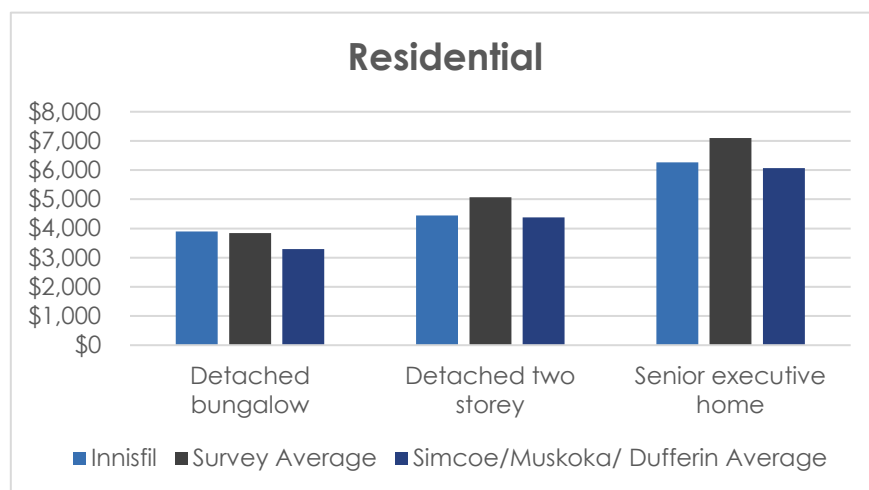
Comparison Data

BMA Management Consulting Inc. surveyed 121 participating Ontario municipalities in 2023 to provide comparisons of factors based on their 2022 financial information. The study indicates that Innisfil is in the “mid” level of surveyed municipalities for residential property taxes and the “mid” level for average gross household income. For commercial and industrial, Innisfil is ranked in the “low” and “mid” ranges respectively.

The BMA annual report breaks down properties into “like” properties for the purpose of comparing the relative tax burden. Examples of “like” categories are Commercial (Office Building Class), Commercial (Hotel), and Industrial (Large). The following table and graphs include a few of these “like” property categories.

2023 BMA Survey Results			
Survey Categories	Innisfil	Survey Average	Simcoe/Muskoka/Dufferin Average
<u>Property Taxes</u>			
Detached bungalow home	\$3,900	\$3,837	\$3,293
Detached two-storey home	\$4,445	\$5,065	\$4,383
Senior Executive home	\$6,264	\$7,097	\$6,065
Commercial per sq. ft. (Shopping)	\$2.02	\$3.89	\$3.51
Industrial (Standard) per sq. ft.	\$1.67	\$1.65	\$1.26
*Average Gross Household Income	\$124,837	\$121,388	\$115,574

* based on the 2023 Manifold Data Mining Inc. report



Appendix F: Summary of 2027-2034 Capital Projects



Summary of 2027-2034 Capital Projects

The tables below summarize the capital projects planned for the outer 8 years of the 10-year capital plan, organized by service bundle. These forecasted projects have been listed to outline a longer-term path for capital initiatives to help plan for future needs. These projects are subject to change as there are many inputs that will be refined over the coming years, such as inflation, project scope, and strategic initiatives. While these figures are subject to change, the 8-year forecast is a valuable tool in identifying the timing of projects so that the Town can effectively plan for the estimated financial impacts.

Corporate Management

Project No. & Project Name	2027-2034 Proposed
ADM10 Community Strategic Plan Development & Fulfillment	150,000
Total Corporate Management	\$150,000

Council & Committee Services

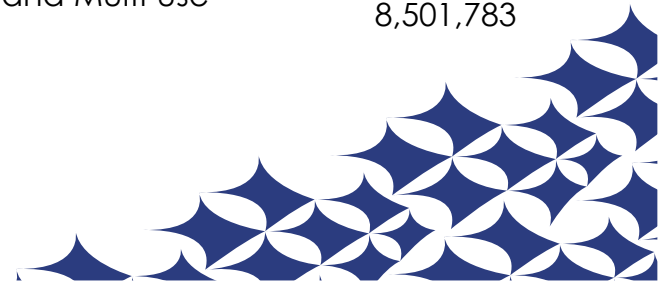
Project No. & Project Name	2027-2034 Proposed
ADM37 Council Strategic Initiatives	200,000
Total Council & Committee Services	\$200,000



Summary of 2027–2034 Capital Projects

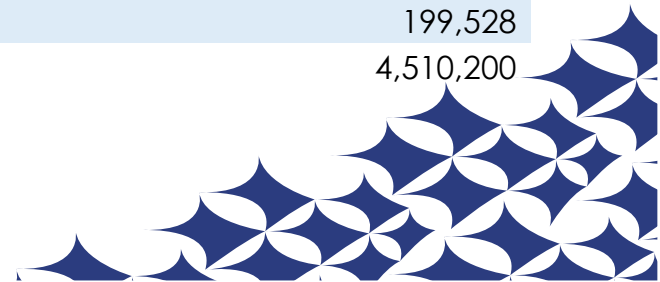
Engineering Services

Project No. & Project Name	2027-2034 Proposed
ENG34 Engineering Standards Update	466,427
ENG52 Transportation Master Plan Update	1,595,602
ENG65 Traffic Calming Identification and Prioritization Study	136,253
FAC44 Cookstown Theater Accessibility Improvements	120,769
FAC45 Stroud-Innisfil Recreation Centre Improvements Design and Construction	22,608,740
FAC46 Morgan Russell Memorial Arena & Community Centre Improvements Design and Construction	23,515,337
FAC52 Operations Frontline Staff and Storage Facility	15,486,234
PKS20 Annual Playground Replacement & Park Redevelopment Program	28,150,161
PKS105 Land and Lakes Plan - Update	1,754,743
PKS191 Lake Side Parks Program - Implement Parks & Recreation Master Plan Recommendations	8,823,425
PKS213 Trail Program - Implement Trails Master Plan	7,373,588
PKS334 Sports Complex	11,762,361
PKS373 Town Campus Master Plan Implementation	16,256,308
PKS374 Innisfil Beach Park- Implement Innisfil Beach Park Master Plan	41,354,174
PKS404 New Development Parks Program	31,443,975
PKS406 Mobility Orbit Square and GO Station Park	28,974,457
PKS426 Campus Grounds - Sports Dome	3,698,279
PKS429 Land Acquisition Strategy	3,904,873
RDS172 Stormwater Pond Cleanout/Retrofit Program	29,064,900
RDS225 Sidewalk Improvement Program	6,503,586
RDS238 Killarney Beach Road/4th Line - John Street to Yonge Street	14,486,223
RDS241 13th Line - Big Bay Point Road/25th Sideroad to Friday Drive - Reconstruction and Multi-use Trail/Paved Shoulders	8,501,783



Summary of 2027–2034 Capital Projects

Project No. & Project Name	2027-2034 Proposed
RDS248 20th Sideroad (Bypass of IBR and Metrolinx Intersection) - Leslie Drive to South of Innisfil Beach Road	167,164,155
RDS296 Roads Needs Study Update	789,718
RDS309 10th Line - Sandy Cove west settlement boundary to Purvis Street - Urbanization/Active Transportation	34,257,959
RDS310 20th Sideroad - Active Transportation - Bradford Boundary to Big Bay Point Road	11,023,518
RDS311 Highway 89 East-West Link - EA and Needs and Justification Study	1,309,045
RDS312 Maple view Drive - 25th Sideroad to 20th Sideroad - Reconstruction	11,213,531
RDS313 6th Line - County Road 27 - 20th Sideroad - Reconstruction and Multi-use Trail	158,699,689
RDS315 Killarney Beach Rd. - Yonge St. to 20th Side Road - Reconstruction/Active Transportation	12,537,483
RDS349 Road Rehabilitation Program	80,000,000
RDS355 Various Bridge/Culvert Rehabilitations	8,102,399
RDS370 Highway 89/Shore Acres- Paved Shoulders Yonge St to 20th Sideroad	1,957,567
RDS374 Traffic Calming Strategy Implementation Program	2,330,259
RDS375 Innisfil Beach Road Gateway Feature	539,442
RDS385 25th Sideroad - Mapleview Drive to Lockhart Rd- Urbanization and Active Transportation	11,256,122
RDS386 25th Sideroad - 10th Line to South of James St. - Urbanization and Active Transportation	15,478,197
RDS387 25th Sideroad - South of James St. to Innisfil Beach Road - Urbanization and Active Transportation	18,864,418
RDS393 Biennial OSIM Inspections for Bridges/Culverts	126,880
RDS395 Big Bay Point Road & 20th Sideroad Intersection Improvements	834,742
RDS396 20th Sideroad (3rd to BBP) Preliminary Design and Phasing	2,621,790
RDS398 10th Line East of Stroud to 20th - paved shoulder	1,259,664
RDS403 Pedestrian Crossing Safety and Operations Study	199,528
RDS404 Pedestrian Crossing Study Implementation	4,510,200



Summary of 2027–2034 Capital Projects

Project No. & Project Name	2027-2034 Proposed
RDS405 Webster Boulevard Extension from the 6th Line to the 5th Line	16,132,820
RDS406 3rd Line, Reive Boulevard to the 20th Sideroad, reconstruction	22,507,122
RDS407 2nd Line, County Road (former Highway) 27 to the 5th Sideroad, reconstruction	10,566,388
RDS408 2nd Line, Reive Boulevard to the 20th Sideroad, Reconstruction	30,002,287
RDS409 Shore Acres Drive, 20th Sideroad to Eastern Limit, reconstruction	5,561,311
RDS410 10th Line, 20th Sideroad to west Sandy Cove Boundary - Reconstruction	3,135,329
RDS411 Webster/Robins Gate/Prince Court Pedestrian Crossing	635,756
RDSOT4 Streetlight Program	1,804,509
SWM13 Storm Sewer Repair Program	5,493,593
SWM24 Shoreline Flooding Management Plan	194,646
SWM25 LID Policy and Tracking Tool	136,253
SWM26 Rain Gauge Study	7,150
SWM27 Culvert Inspections identified in SWM Master Plan	143,065
SWM28 2029 Stormwater Master Plan Update	498,561
SWM29 2034 Stormwater Master Plan Update	624,185
SWM30 Phase 2 SWM Facility Study	647,558
SWM34 Storm Sewer Model	170,315
SWM36 Flood Mitigation Program	59,131,844
SWM38 New Stormwater Facility at Aspen Park (SWM MP location 7)	1,701,538
SWM39 New Stormwater Facility on King Street North (SWM MP Location 1)	3,664,395
SWM40 New Stormwater Facility Stroud	3,111,939
Total Engineering Services	\$1,016,929,069



Summary of 2027–2034 Capital Projects

Facilities Management

Project No. & Project Name	2027-2034 Proposed
FAC21 Town Facilities - HVAC Capital Renewal Program	3,220,000
FAC23 Town Facilities - Roofing Capital Renewal Program	4,340,000
FAC25 Town Facilities - General Capital Renewal Program	5,210,000
FAC26 Town Facilities - Arenas and Rinks Capital Renewal Program	1,915,000
FAC41 Building Condition Assessments	135,000
Total Facilities Management	\$14,820,000

Financial Management

Project No. & Project Name	2027-2034 Proposed
ADM67 Development Charges Background Study Update, Community Benefits Charges & Parkland Strategy	390,000
Total Financial Management	\$390,000

Fire Protection

Project No. & Project Name	2027-2034 Proposed
FAC36 Fire Stations - Capital Renewal Program	2,188,612
FIRE2 Firefighter Bunker Gear	1,244,397
FIRE62 Replacement Gas Detection Devices	30,000
FIRE71 Replacement of Bunker Gear Extractor (Station 2)	34,000
FIRE72 Replacement of Breathing Air Compressor (Station 2)	100,000
FIRE73 Replacement of Bunker Gear Extractor (Station 4)	36,000

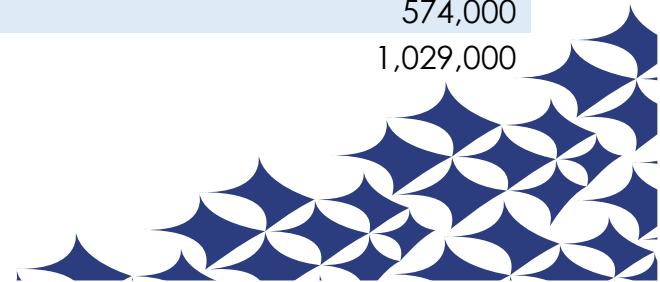


Summary of 2027–2034 Capital Projects

Project No. & Project Name	2027-2034 Proposed
FIRE76 Fire Station - Furniture and Fixtures Renewal	64,000
FIRE77 Fire Equipment Renewal	120,000
FLT291 Replacement Fire Utility 3 Unit 12-175	138,500
FLT402 Replacement of Tank 5 Unit 12-176	1,032,930
FLT403 Replacement of Utility 1 Unit 17-171	145,425
FLT404 Replacement of Utility 5 Unit 19-187	160,228
FLT405 Replacement of Fire Prevention Vehicle Unit 19-225	70,010
FLT406 Replacement of Tank 4 Unit 14-178	1,155,949
FLT407 Replacement of Pump 5 Unit 15-182	2,816,820
FLT408 Replacement of Rescue 2 Unit 16-184	2,982,704
FLT409 Replacement of Rescue 4 Unit 17-165	184,262
FLT410 Replacement of Tank 2 Unit 18-183	1,423,652
FLT425 Replace Fire Apparatus Unit 19-162	3,497,916
Total Fire Protection	\$17,425,405

Fleet Management

Project No. & Project Name	2027-2034 Proposed
FLT329 Additional 1 Ton Dump Truck / Water Truck	185,000
FLT386 Fleet Services Sustain (Replace) Vehicles & Equipment Program	37,643,569
FLT396 Additional Sidewalk Machine	360,000
FLT413 Building Fleet Sustain (Replace) Vehicles	538,500
FLT414 Fleet Growth Vehicles & Equipment	5,285,700
FLT417 Shop Hoist Replacement Program	574,000
FLT418 Municipal Charging Stations	1,029,000



Summary of 2027–2034 Capital Projects

Stormwater Management

Project No. & Project Name	2027-2034 Proposed
PKS408 Urban Forestry Canopy Program	6,165,000
SWM7 Stormwater Management Facility Sediment Surveys	338,000
SWM9 Cross Culvert Replacement Program	743,000
SWM10 Invasive Phragmites Control Program	717,000
SWM11 Stormwater CCTV Inspections	1,042,000
SWM16 Stormwater CCTV Inspections	1,329,000
SWM17 Hewitts Creek Drainage Works, Branch Drain Petition (Section 4)	1,559,000
SWM18 8th Line Drainage Works, Branch Drain Petition (Section 4)	1,319,000
SWM19 Catch Basin Repair and Replacement Program	1,823,000
Total Stormwater Management	\$15,035,000

Transportation Network

Project No. & Project Name	2027-2034 Proposed
RDS400 IBR Acoustical Fencing	832,000
RDS401 Webster Blvd Acoustical Fencing	387,000
RDS402 Traffic Lights and Signals Rehabilitation Program	100,000
Total Transportation Network	\$1,319,000



Appendix G: Policies & Long-Range Financial Plan



Policies & Long-Range Financial Plan

Financial policies provide guidance to staff to ensure that the operating and capital budgets are prepared in a financially sustainable manner and align with the Town's long-term goals. Full details of each policy and more information related to the Town's Long-Range Financial Plan can be found online at innisfil.ca/budget.

The following financial policies, accompanied by a brief description, are some of the key policies that have been referenced while preparing the 2025-2026 Budget:

Policy	Description of Policy
Multi-Year Budget Policy	This policy establishes guidelines for the planning, development, and approval of multi-year budgets. In addition, direction is provided for adjustments of multi-year budgets, if needed.
Property Tax Operating Surplus/Deficit Disposition Tax Rate Stabilization Reserve	This policy provides direction for the treatment of any annual operating surplus or deficit that occurs from property tax-related activities. It also defines circumstances for accessing tax rate stabilization reserve funds, minimum/maximum balances, and balance restoration guidelines.
Debt Management Policy	This policy sets out the strategy, methods, goals, and controls for managing debt requirements and commitments while ensuring compliance with the Municipal Act, 2001 as amended and related Regulations.
OLG Slots Revenue – Allocation & Utilization Policy	This policy sets out the financial strategy for the allocation and utilization of the revenues received from the Ontario Lottery & Gaming Corporation (OLG) relating to the Town's share of slot machine revenue generated from Gateway Casinos Innisfil, formerly known as Georgian Downs.

Policy	Description of Policy
Capital Budget Funding Policy	This policy sets out a funding strategy for capital initiatives to ensure that service and infrastructure standards can be met with minimal/manageable increases in tax and user rates while avoiding drastic cuts in service levels.
Long-Range Financial Plan	This document analyzes the Town's financial health compared to current economic conditions and other municipalities. It includes a twenty-year forecast and concludes with recommendations and improvements to strengthen the Town's financial planning policies to achieve greater stability.



Appendix H: Glossary



Glossary

See the table below for more information on some of the common and reoccurring terms/categorizations used throughout the budget document.

Term	Definition
Operating Budget – Revenue Categories	
Payment-in-lieu of taxes (PIL) and Supplementary Taxes	Before final approval of the budget, this line represents staff estimates for supplementary tax additions and omitted billings net of tax write-offs from the Assessment Review Board (ARB) and projected payment-in-lieu of taxes from Provincial and Federal Agencies.
Registration and Facility Fees	Revenues from participants in Town-delivered recreation programs and from the use of Town facilities by sports and other groups.
Permits and other development fees	<p>Revenues related to permit activity including building and septic inspections and fees for zoning, site plan, and minor variance applications.</p> <p>Building permit fees are collected whenever new buildings and structures are constructed or when major renovations to existing buildings are being made. The full amount is payable prior to the issuance of the permit and is used to cover the cost of inspections required for compliance with the Building Code Act (BCA). Any unused funds remaining at the end of a year must be placed in a reserve account for future use and cannot be used or applied to reduce property tax requirements.</p>
User Fees, Licences, Fines	Included in this line are the various fees and charges that are collected by departments for the delivery of specific services and contained in the annual Fees and Charges By-law. Examples include tax certificates,



Term	Definition
	business & lottery licences, compliance letters, concession and advertising revenues, sale of documents, animal control, parking, and other by-law infraction fines, etc.
Penalties and Interest	Corporate penalty and interest for late or non-payment of billed amounts for property tax and miscellaneous receivable accounts.
Interest and Dividends	Corporate revenues reflecting bank and investment interest earned on cash balances plus dividends received from Town subsidiaries (for example InnPower Corporation).
OLG Gaming Revenue	Revenue anticipated to be received as per the agreement with Ontario Lottery & Gaming Corporation (OLG) to allow gaming activities to occur within municipal borders. In accordance with the OLG Allocation and Utilization Policy (CP.07-11-05) as amended, of the revenue received from slot machine and gaming activity at Gateway Casinos Innisfil, \$200,000 is allocated to the Innisfil Community Foundation, and the remaining is set aside in reserve fund (ARS) and used to fund the non-growth portion of growth-related projects, and one-time, non-recurring expenditures that could be capital or operating in nature. It is important to note that the Town does not utilize the OLG revenues to fund regular recurring operating expenses, thereby mitigating the impact that reduced OLG revenues would have on the operating budget.
External Recoveries	Revenues recovered through third parties' contractual agreement billings, from property owners for specific capital works, or for tax arrears collection costs that can be charged to the property tax roll.



Term	Definition
Other	Includes Provincial Offenses Act (POA) revenue received from the City of Barrie, Provincial and Federal grants, and miscellaneous minor other revenues.
Transfer from Reserve/Reserve Funds	Planned use of various reserves or reserve funds that minimize the effect on the taxpayer for one-time, non-recurring items or to offset long-term debt servicing costs. For example, funds are allocated from development charge reserve funds and applied to the debt servicing costs for the Innisfil Recreation Centre and Cookstown Library.
Operating Budget – Expenditure Categories	
Wages & Benefits	All wages, overtime, contractual economic adjustments, and employee benefits for full and part-time Town employees and Council to be incurred to deliver services.
Materials and Supplies	Costs of office supplies, roads and facilities maintenance materials, postage, education and training, memberships, conferences and seminars, advertising, vehicle licences and maintenance, books and publications, fuel, sand and salt, etc.
Utilities	Hydro, heating, water and wastewater, telephone, cell phones.
Contracted Services	Costs for external professionals, lawyers, agencies, and contractors. Includes roads and facilities maintenance and related activities.
Rents and Financial	Cost to rent facilities (schools or private) for delivery of programs and services. Includes bank service fees for credit card and debit card transaction processing, file transfer fees, PayPal fees, etc.
Long-term Debt Principal & Interest	Debt servicing expenses related to the retirement of outstanding debentures and applicable interest.



Term	Definition
Transfers to Reserves/Reserve Funds	Using existing policies transfers are made to reserves/reserve funds based on income received or identified needs for future asset replacements. For example, OLG funds are shown as revenues but 100% is transferred to reserve for use towards offsetting debt costs, etc.
Internal Recoveries/Transfers	Reallocation of time/costs between service areas (e.g. Director time spent overseeing their service areas). Also includes recovery of staff, facilities, fleet recoveries and other expenses between departments. Assists when developing full cost recovery for fees and charges.
Capital Budget – Sources of Capital Funding	
Grants & Other Recoveries	Grant funds received from government-related programs, such as the Federal Gas Tax program and the Ontario Community Infrastructure Fund (OCIF) which help fund the Roads Rehabilitation Program. Other recoveries include amounts received from external parties.
Alternative Revenue Source (ARS)	Money received from the Ontario Lottery & Gaming Corporation (OLG), generated from Gateway Casinos Innisfil, is transferred in accordance with policy CP.07-11-05 to the Alternative Revenue Source (ARS) Reserve Fund. The utilization of ARS is intended for the “benefit to existing taxpayers” (non-growth) portion of related capital projects, and one-time strategic initiatives.
Capital Tax Levy	The amounts collected annually through the operating budget for the 1% capital levy are transferred into this reserve. These funds are used to fund the repair and replacement of existing assets, or to fund new assets/projects that are not eligible for funding from development charges.
Tax Supported Reserves	This category is comprised largely of fleet reserve revenues. Through the operating budget, an amount is collected annually and set aside in a fleet



Term	Definition
	reserve. These fleet reserves are used for the replacement of Town fleet. Included in this category as well are funds utilized from library and building inspection capital reserves.
Community Benefit Charges	Community Benefit Charges (CBC) are imposed on higher density developments (5 storeys or more and contain 10 or more residential units) to pay for “facilities, services, and other matters attributable to the anticipated development and redevelopment to which the community benefits charge by-law would relate.” CBC revenues collected are held in a dedicated reserve fund with transactions reported annually.
Development Charges	Development Charges (DCs) are collected on new construction. These funds are restricted in use through provincial legislation and can be used solely for the purpose of growth-related capital projects, such as new vehicles required for operational activities, facilities needed to accommodate various services throughout the town, new parks and amenities, and various growth studies. These funds must be reported annually on how they were used.
Restricted Reserve Funds	Funds in this category are restricted in how they can be used, either by legislation or agreement. The largest reserve fund in this category is the 7/8th Line reserve fund. The Town collects funds through the 7/8th Line developer’s agreement at time of building permit issuance. The funds collected are transferred to a reserve fund and used as a funding source for capital works related to the 7/8th Line agreement.

Capital Budget – Project Classification Categories



Term	Definition
Renewal & Other	Projects that address major lifecycle repairs, maintenance, and/or technological upgrades to extend the expected useful life of existing assets or to replace existing assets that have reached the end of their useful lives. This also includes capital works that are ineligible to be funded from development charges.
Growth	Projects that are primarily new assets that address increased demands and service levels required by new growth and expansion, funded primarily from development charges.
Capital Budget – Project Type Categories	
Administration (ADM)	General Town-related studies that fall outside of the below categories including but not limited to human resources master plans, development charges background studies, strategic plans, emergency management, and corporate land transactions.
Engineering (ENG)	Infrastructure-related studies and plans such as engineering standards, transportation master plans, development guidelines, and asset management plans.
Facility (FAC)	All works related to improving and maintaining Town-owned facilities (excluding Library) including but not limited to Town Hall, community centres, and facility management works.
Fire (FIRE)	Fire protection-related projects including but not limited to bunker gear, defibrillators, pagers, rapid intervention packs, hoses, heavy extrication equipment (excluding Fleet).
Fleet (FLT)	Vehicles and operating equipment including but not limited to Zambonis, graders, and pickup trucks.



Term	Definition
Information Technology (IT)	Hardware or software-related projects including but not limited to computers, server replacements, and phone systems.
Library (LIB)	Library-related projects including but not limited to library equipment, furniture, library master plans, and buildings.
Parks (PKS)	Parks-related projects including but not limited to Town facilities and furniture (excluding Library), playground equipment, park master plans, and trails.
Planning (PLN)	Town-wide studies and plans relating to design, official plans, visioning, and policy implementation plans. For example, employment lands studies, placemaking studies, agricultural and rural area studies.
Roads (RDS)	Road-related projects including but not limited to rehabilitation road works, urbanizations, bridges, streetlights, guiderails, and sidewalks.
Stormwater (SWM)	Stormwater-related projects including but not limited to inspections, retrofits, and cleanouts.



Appendix I: Customer Service Business Plan



Customer Service

Service Business Plan

Executive Sponsor: CFO/Director of Corporate Services & Innovation

Service Lead: Supervisor of Customer Service



Our Services

Whether on the phone, in person or through digital channels, the Customer Service team strives to help members of the public quickly and easily access the Town and its services; often delivering effective single-point-of-contact solutions to public inquiries and concerns.

Centralized Customer Service – We are one of our few County partners with a truly centralized service delivery model. We deliver our services with a focus on first-contact resolutions, creating memorable experiences while building trusting and long-lasting relationships with community members.

Our service delivery model is based on engaging the right resources at the right time to deliver value for every tax dollar efficiently and effectively. Channelling services and interactions centrally through Customer Service allows for better data collection, systemic issue analysis, and centralized tracking from initial inquiry/request to resolution. We achieve this through cross-functional collaboration and a focus on being the voice of our residents in our contributions to projects and initiatives that reimagine municipal service delivery.

Digital Service Support and Promotion – We have always embraced our role in educating and building comfort in digital service delivery options, but it became our mission during the COVID-19 pandemic to ensure residents could continue accessing municipal services fully and seamlessly. This helps us reduce the number of routine interactions received through our channels and expands our capacity to spend more meaningful time with residents/customers

who have more complex inquiries. Future targets are intended to establish a stable trendline as we manage growth and continue our efforts to educate externally and contribute internally to support the expansion of online information, payments, and 24/7 self-serve options.

Service Counter – We deliver frontline customer service at our Town Hall Service Counter, delivering a variety of in-person services to our customers. Our Service Counter also acts as a centralized payment processing hub for all Town payments submitted outside of digital channels, administrative support for animal licensing and resident notices, and handles all incoming and outgoing mail to ensure paperwork gets to the right staff/service area. In 2023, counter volumes exceeded pre-pandemic levels and are expected to increase further in 2024.

Call Centre – All inbound inquiries received by phone and digital channels are supported by our Intake and Information Team. Their first objective is to deliver accurate information and relevant resources to resolve customer inquiries within the first contact. Where further internal consultation or investigation is required, customers are thoroughly screened and a new MoAR inquiry is opened and actioned with the applicable service area.

Resolutions – MoAR inquiries are managed based on ward by our Resolutions Team. This team facilitates internal investigation and communication with cross-functional colleagues and/or external stakeholders, acts as the customer's primary liaison, and engages in meaningful touchpoints with the customer over the course of the file until it is fully resolved.





Measuring Work & Performance

Performance Measure	Actual			Projected		
	2021	2022	2023	2024	2025	2026
# of inbound customer inquiries	54,510	34,907	50,852	52,236	53,280	53,450
% of inquiries resolved in first contact	80%	77%	86%	84%	84%	84%
Answer rate of inbound calls	90%	90%	88%	95%	95%	95%
Avg wait time of inbound calls (min:sec)*	2.51	4.05	4.79	< 5	< 5	< 5
# of MoAR inquiries opened**	5,229	5,388	5,046	5,000	5,100	5,200
% of MoAR cases closed within 7 calendar days	56%	56%	59%	65%	65%	65%
% of MoAR cases closed after 30 calendar days	20%	16%	24%	10%	10%	10%

Note: *Wait times include the time it takes for customers to receive a callback through our automated callback system. Future targets are based on an average 5-minute wait time whether customers are waiting in our call queue or have requested an automated callback.

** The Town's Municipal Operations and Reports (MoAR) system compiles data across departments to help respond to inquiries. MoAR inquiries are opened when further follow-up or action is required and do not include first-contact resolutions.



Our Operating Budget Overview

	2024		2025		2026			
	Approved Budget	Proposed Budget	Year to Year \$ Change	Year to Year % Change	Proposed Budget	Year to Year \$ Change	Year to Year % Change	Note
Revenues								
User Fees, Licences and Fines	(\$17,025)	(\$11,200)	\$5,825	(34.2%)	(\$11,700)	(\$500)	4.5%	1
External Recoveries	(54,000)	(54,000)	-	0.0%	-	54,000	(100.0%)	2
Total Revenues	(\$71,025)	(\$65,200)	\$5,825	(8.2%)	(\$11,700)	\$53,500	(82.1%)	
Expenditures								
Wages & Benefits	\$730,554	\$795,856	\$65,302	8.9%	\$826,753	\$30,897	3.9%	3
Materials & Supplies	14,654	10,918	(3,736)	(25.5%)	11,493	575	5.3%	4
Utilities	1,054	1,054	-	0.0%	1,054	-	0.0%	
Contracted Services	500	500	-	0.0%	500	-	0.0%	
Rents & Financial	3,000	3,500	500	16.7%	4,000	500	14.3%	
Internal Recoveries/Transfers	23,000	25,700	2,700	11.7%	26,300	600	2.3%	
Total Expenditures	\$772,762	\$837,528	\$64,765	8.4%	\$870,100	\$32,572	3.9%	
Sub-Total Operating Budget	\$701,737	\$772,328	\$70,590	10.1%	\$858,400	\$86,072	11.1%	
Add: Change Requests	-	63,017	63,017	0.0%	88,381	25,364	40.2%	5
Total Operating Budget	\$701,737	\$835,344	\$133,607	19.0%	\$946,781	\$111,437	13.3%	

Note: Explanation of Change

- (1) Adjusting commissioning and tag revenue to reflect historical trends.
- (2) Reduction in InnServices recoveries expected in 2026 due to changes to MOU.
- (3) The 2025 & 2026 change in wages and benefits reflects salary progressions, employment agreements, economic adjustments, and changes in benefit costs.
- (4) Reduction to purchased services for bag tags to reflect historical spending.
- (5) Change request reflects the addition of a Customer Service Representative. Details of the change request can be found in the following pages.





Service Change Request

Service Level Change: 1 FTE – Customer Service Representative

Proposed Start Date: April 1, 2025

Current Service Level:

The current level of service is:

- 1 FTE Supervisor of Customer Service
- 3 FTE Customer Ambassadors (Resolutions)
- 4 FTE Customer Service Representatives (Combined Service Counter, Call Centre and Digital Channels)
- 1 FT Customer Service Representative Contract (unbudgeted)

Business Case Rationale:

All inquiries, complaints, and requests for service received from members of the public are channelled through Customer Service under our centralized service delivery model. In 2023, Customer Service staff managed 50,852 inbound inquiries across all channels, delivered first-contact resolutions 86% of the time, and facilitated the closure of 5,035 MoAR files - 59% of which were closed within seven calendar days.

The Customer Service team has had additional frontline support through unbudgeted Customer Service Representative contracts to help manage public inquiry volumes for 5+ years. This has enabled us to provide the same quality of service our community expects and appreciates. These costs were traditionally managed using gapping dollars and other budget line items within the approved operating budget. In recent years, our budget has been operating at an unfavourable variance to continue maintaining 1 unbudgeted contract Customer Service Representative.

Our operating model underwent a significant transformation in Q3 2021 in recognition that our resources were deployed disproportionately across the customer journey and solidified the expansion in the scope of Customer Service's role from a centralized service delivery model to a full-service delivery model. Customer Service business operations were categorized into 3 Service Categories served by two "sub-teams" within the Customer Service team; deploying resources more equitably across service categories in a more focused approach. This has resulted in a stronger balance of support in the customer journey from start to finish and improved the quality of service and work environment by significantly reducing the amount of multi-tasking required by staff. Customer Service took ownership of managing MoAR files to facilitate internal investigation and collaboration while acting as the primary liaison and gateway to municipal services to ensure a positive experience across the customer journey. This approach significantly reduces the need to engage cross-functional resources to ensure Town-wide resources and expertise are deployed as efficiently as possible.

As our community has grown, managing the volume of inbound inquiries and quality of service with existing resources has become increasingly difficult despite the support of contract staff. This team is at full capacity. Delivering first-contact resolutions and taking ownership of public inquiry files involves the investment of time and resources into each and every interaction we have with our residents/customers. Maintaining an unbudgeted Customer Service Representative contract position has been instrumental in the implementation and continued evolution of our enhanced operating model while managing population growth and navigating the post-pandemic service environment and service expectations of our residents.

The main role of this position will be to support Call Center operations to maintain current performance indicators. This would reduce the daily need to "pull" resources from one service category to cover another service category during breaks, lunches, or absences as well as provide a more dedicated focus on digital intake and information channels. Not proceeding with this position would have a direct impact on the customer experience and increase the level of multi-tasking required by staff thus impacting the quality of service delivered. In 2023 when the number of Call Center staff was reduced due to absences, we saw the following impacts:

Metric	4 Call Center Staff	3 Call Center Staff	2 Call Center Staff
Average wait time (min:sec)	3:13	5:21	8:00
Answer Rate	93%	86%	79%
% of Calls that Waited	39%	56%	67%

 **Financial Impact on the 2025-2026 Budget**

Operating Budget Impact	2025 Partial-Year Impact	2026 Full-Year Impact
<u>Revenues</u>		
N/A	-	-
<u>Expenditures</u>		
Wages & Benefits	\$59,717	\$85,081
IT & Licensing Costs	3,300	3,300
	<u>63,017</u>	<u>88,381</u>
Net Operating Budget Cost/(Savings)	\$63,017	\$88,381

Capital Budget Impact	2025 Partial-Year Impact	2026 Full-Year Impact
<u>Revenues</u>		
Capital Discretionary Reserve Fund	(\$3,100)	\$0
Total Capital Revenues	(\$3,100)	\$0
<u>Expenditures</u>		
IT Setup	\$3,100	\$0
Total Capital Expenditures	\$3,100	\$0

