



# City of Stratford Business Process Review: Facilities Data Collection Strategy

Final Report

January 14, 2022



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This report may include or make reference to future oriented financial information. Readers are cautioned that since these financial projections are based on assumptions regarding future events, actual results will vary from the information presented even if the hypotheses occur, and the variations may be material.

Comments in this report are not intended, nor should they be interpreted, to be legal advice or opinion.

KPMG has no present or contemplated interest in the City of Stratford nor are we an insider or associate of the City of Stratford. Accordingly, we believe we are independent of the City of Stratford and are acting objectively.

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# Project Overview

**City of Stratford**

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# Executive Summary

This executive summary highlights the work KPMG was engaged to perform including key activities, deliverables and recommendations

## Executive Summary

KPMG was engaged by the City of Stratford to perform a business process review covering fourteen (14) City facilities and to create a data collection strategy to enhance the collection, reporting and analysis of three (3) key metrics including:

1. Maintenance and capital costs
2. Internal and external work orders
3. Utilization

This project was conducted in light of the City's Service Delivery Review (2020) which noted that these metrics were not supported with sufficient data.

As part of this work, KPMG held ten (10) interviews and two (2) focus groups with City staff. KPMG also analyzed documentation to understand the existing process to track these metrics including systems, process owners, data structure and system reports.

Based on this analysis, KPMG created a data collection strategy including sixteen (16) observations and recommendations to enhance the collection, reporting and analysis of facility data. KPMG noted that the City does have systems in-place that are currently tracking facility data; however, further system configurations are required to improve its accuracy, completeness and relevance.

The most notable recommendations in this report include include:

1. Consider centralizing facility maintenance, custodial work and capital planning in one department – with an additional FTE (Supervisor) responsible for the portfolio of all facilities
2. Use the Citywide PSD software to track internal and external work orders by purchasing a new module to enable this functionality

KPMG developed a high-level implementation plan to support the data collection strategy. The plan highlights anticipated timelines and assigns responsibilities to City staff for implementation.

Finally, KPMG created a tool in Microsoft Excel to track these (3) metrics until the City has implemented the data collection strategy. The tool is configured using reports from the City's existing software and can be used to track and analyze facility metrics for the year 2022.

# Summary of Findings

The sixteen (16) observations and data collection strategy recommendations presented in the preceding pages are summarized below by metric (KPI), software and the departments that would likely be responsible for implementation. KPMG noted that the City does have systems in-place that are currently tracking these data points; however, further system configurations are required to improve data accuracy, completeness and relevance.

Metric	Software	Primary Owner	Summary of Recommendations	Ref. #s
Work Orders	Citywide PSD	Community Services/ Infrastructure and Development Services	<ul style="list-style-type: none"> <li>Extend the internal work order tracking process across all departments until a software solution is adopted (short-term)</li> <li>Implementation of a module within Citywide PSD to manage internal and external work orders (long-term)</li> </ul>	2,3,4
Facility Maintenance & Capital Expenditures	Microsoft Dynamics GP	Corporate Services	<ul style="list-style-type: none"> <li>Grant managers access to the Management Reporter tool to analyze spend versus budget</li> <li>Perform software configurations to improve the quality, accuracy and categorization of financial data</li> </ul>	5,6,7,8
Utilization	PerfectMind	Community Services	<ul style="list-style-type: none"> <li>Perform software configurations to improve the quality, accuracy and categorization of utilization data</li> <li>Group and compare utilization metrics for rooms and programs according to the existing groupings used for budgeting purposes</li> </ul>	9-14

# Observation & Data Collection Strategy

## Summary of Findings

The sixteen (16) observations and data collection strategy recommendations presented in the preceding pages are summarized below by metric (KPI), software and the departments that would likely be responsible for implementation. Contrary to observations made in the City’s Service Delivery Review – that the City is not tracking maintenance costs, utilization and work order data – KPMG noted that the City does in fact have systems in-place that are currently tracking these data points; however, further system configurations are required to improve data accuracy, completeness and relevance.

Metric	Software	Primary Owner	Summary of Recommendations	Ref. #s
Governance	N/A	Corporate Initiatives CAO	<ul style="list-style-type: none"> <li>Consider the appropriate staff member to own and oversee the KPMG reporting tool including populating it with updated data (short-term)</li> <li>Centralize facility maintenance, custodial work and capital planning in one department – with one Director responsible for the portfolio of all facilities (long-term)</li> </ul>	1,15
Service Delivery	Citywide PSD, Microsoft Dynamics GP & PerfectMind	Corporate Initiatives CAO	<ul style="list-style-type: none"> <li>Consider the disposition of under-utilized and less functional facilities using KPMG’s interim reporting tool or system reports after implementing the data collection strategy recommendations contained within this report.</li> </ul>	16

# Project Overview

## Project Objectives

KPMG was engaged by the City of Stratford (the “City”) to perform a business process review, identify strengths, weaknesses, opportunities and challenges and generate actionable recommendations for data collection that can be integrated into daily staff responsibilities. The data collected for this process will be used to inform future service delivery recommendations that will improve efficiencies and produce cost savings. KPMG will also develop a data strategy reflecting the optimal approach for data collection with current resources and identify whether further human resources or technology is required.

## Project Principles

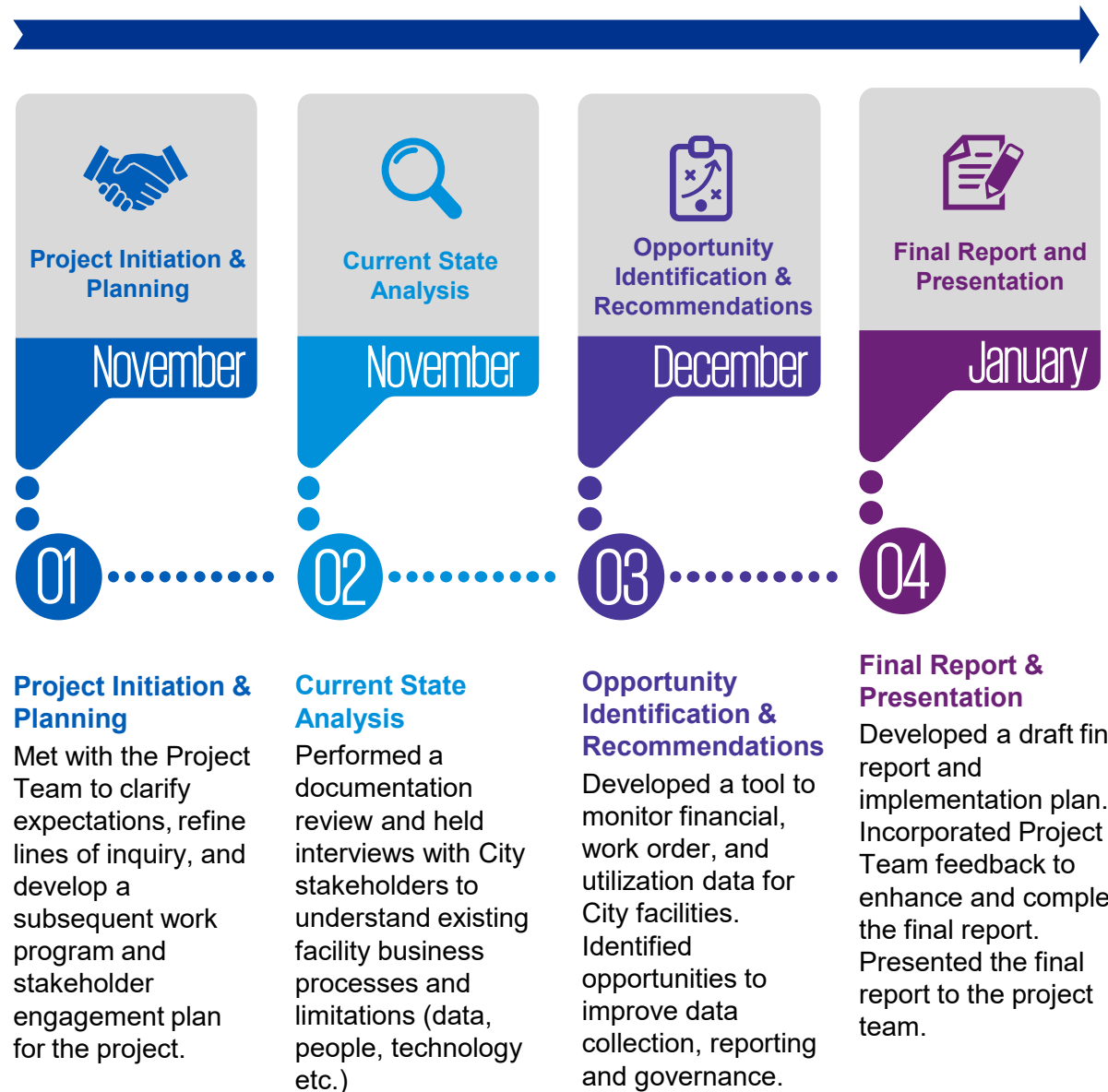
KPMG conducted all phases of the project with the following principles in mind:

- a) The knowledge and expertise of City staff was fully engaged and built upon, to arrive at recommended actions through a transparent, participative and inclusive process facilitated by KPMG.
- b) The review was conducted in a way that engaged City employees.
- c) The aim was to, wherever possible, transfer knowledge and necessary “tools” to City staff to enable them to better develop their own solutions to operational and process issues and challenges over time.
- d) The framework and approach was based on leading practices from other municipalities, or other levels of government experience and/or private sector.



# Project Work Plan

The project began on November 4, 2021 and was completed with submission of the final report to the City Council in February 2022.





# Summary of Stakeholder Consultations

**City of Stratford**

**Business Process Review**

**Final Report**



## Summary of Stakeholder Consultations

# The Engagement Process

As part of the project, senior leadership, managers and staff were interviewed to obtain an understanding of existing business processes, systems and data sources related to facility data collection, analysis and reporting. The interviewees also identified challenges and opportunities for financial and operational efficiencies.

KPMG held ten (10) one-on-one discussions with the following individuals as well as two (2) focus groups as selected by the City of Stratford:

### One-On-One Interviews

- |   |  |
|---|--|
| <ol style="list-style-type: none"><li>1. Office of the CAO</li><li>2. Director of Community Services</li><li>3. Director of Infrastructure and Development Services</li><li>4. Director of Corporate Services</li></ol> | <ol style="list-style-type: none"><li>5. Manager of Community Facilities</li><li>6. Supervisor of Facility Maintenance</li><li>7. Chief Building Official</li><li>8. Manager of Recreation and Marketing</li><li>9. Manager of Parks, Forestry, and Cemetery</li><li>10. Maintenance Staff</li></ol> |
|---|--|

### Focus Groups

- |   |  |
|---|--|
| <ol style="list-style-type: none"><li>11. Group 1:<ol style="list-style-type: none"><li>a) Manager of Public Works; Manager of Transit; and the Supervisor of Fleet</li></ol></li></ol> | <ol style="list-style-type: none"><li>12. Group 2:<ol style="list-style-type: none"><li>a) Administrative Assistant to Director of Community Services; Clerk Secretary for Recreation Facilities; and the Clerk Secretary for Recreation Programming</li></ol></li></ol> |
|---|--|

# Summary of Themes from Consultations

Key themes emerged from the interviews and focus group discussions which are summarized below.



## People

- Multiple departments are responsible for facility maintenance and capital improvements (decentralized model), namely, Community Services, Transit and Infrastructure and Development Services
- Each department has its own custodial staff responsible for the dedicated facilities.
- External contractors are typically used for HVAC, plumbing, carpentry, electrical and other maintenance
- There is a lack of staffing resources for asset management planning (AMP); however, a new AMP Coordinator position was recently approved to support this activity
- Additional resources are required for maintenance and capital improvements to the facilities if the City is to meet its 10 year capital plan



## Technology

- PerfectMind software is used to track utilization data for various community & recreational programs; however, access to the software is limited; system data is seldom analyzed; and more system configuration is required to fully take advantage of the software
- Facility maintenance and capital costs are tracked within the City's finance software, Microsoft Dynamics GP
- Not all staff are aware of or have access to Management Reporter, a software used to track facility maintenance and capital costs (spend)
- The internal work order tracking system is not automated but manual in nature (paper-based); and there is currently no software to track external work orders. Moreover, the process has only been implemented for community services facilities, not the administrative or transit facilities



## Service Delivery Model

- Staff noted that facility maintenance and capital expenditures for the facilities have been under-funded historically
- Front-line staff and managers noted they are responsible for facility maintenance and capital improvements and do not necessarily have the experience or the expertise to manage these responsibilities
- Building condition assessments have not consistently been performed for the City's facilities
- Staff noted the Discovery Centre was acquired from the Province for it to be preserved; however, the facility is currently leased for minimal revenues compared to the cost of maintenance and capital
- The City has an asset management plan; however, staff noted the City does not have well-established processes and technology to support asset management activities in general



# Observations & Data Collection Strategy

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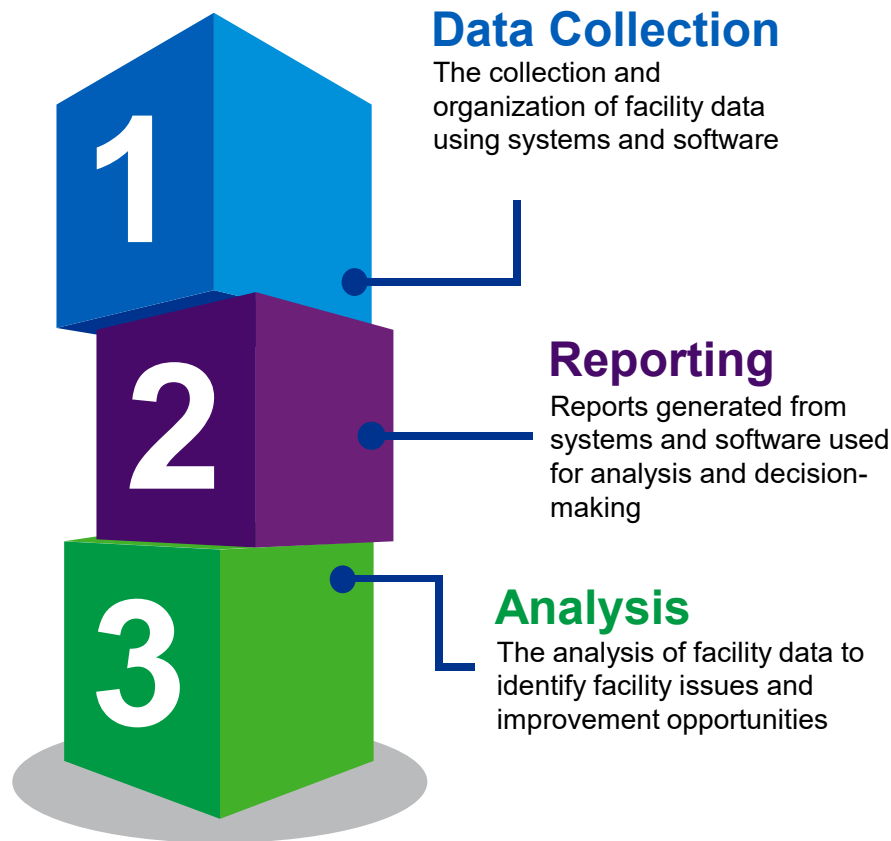
# Review of Facility Business Processes

In 2020, the City of Stratford undertook a corporate-wide Service Delivery Review (SDR). The review noted that the City was not tracking maintenance costs, work orders and utilization data for its facilities, and therefore, did not have sufficient data to support efficiencies and cost savings in the maintenance and operation of its facilities.

To better understand these issues and develop a data collection strategy for the City, KPMG analyzed the City's business processes including (1) facility data collection, (2) reporting, and (3) analysis. KPMG conducted interviews with staff and analyzed City documentation to identify:

- a) Existing processes to collect facility maintenance costs, utilization data and work orders
- b) The suitability and capabilities of existing systems and software to track and report facility data
- c) Staff that interact with this software
- d) The structure and types of data currently stored within the software including its accuracy, completeness and relevance; and
- e) The types of reports that can be generated from existing software including key performance indicators (KPIs)

## Business Processes Analyzed for the City's Facilities



# Observation & Data Collection Strategy

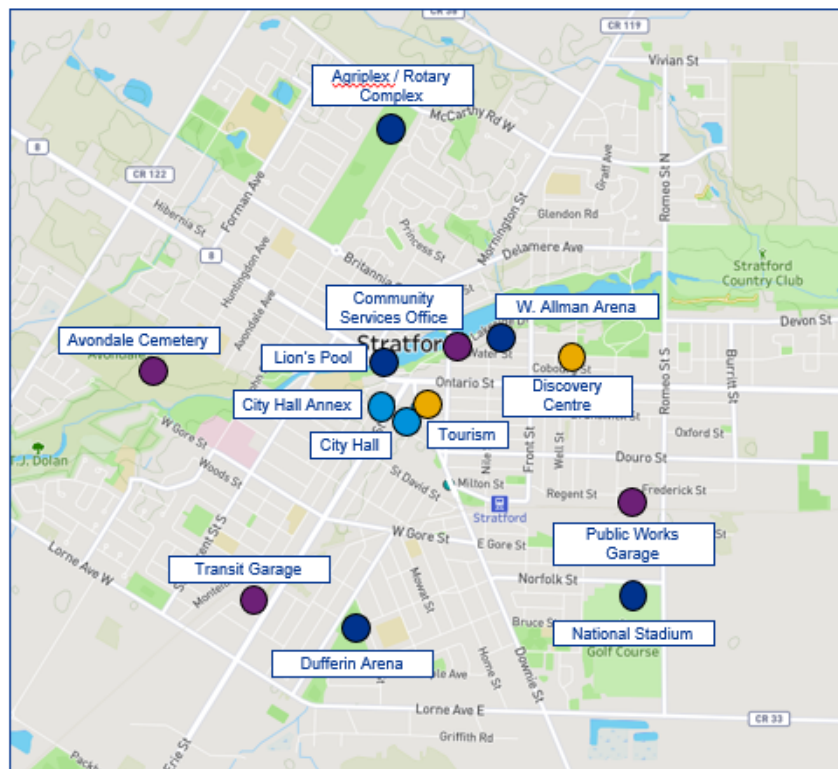
## In-Scope Facilities

KPMG analyzed these business processes covering fourteen (14) in-scope facilities as selected by staff at the City of Stratford. The City has other facilities within its municipal portfolio; however, the in-scope facilities were selected as a representative sample and vary by geography, size, age, usage and department.

### Legend

Building Type		In Scope Buildings
●	Recreation	Agriplex Rotary Complex Lion's Pool National Stadium Dufferin Arena William Allman Arena
●	Administrative	City Hall City Hall Annex Building
●	Storage	Avondale Cemetery Community Services Transit Garage Public Works Garage & Offices
●	Rental	Discovery Centre Tourism Building

### In-Scope Facilities at the City of Stratford



# City Systems

The city uses five (5) systems to record, report and analyze facility data which KPMG identified through staff interviews. Each system is identified in the table below including its purpose, facility metrics and access rights.

System	Purpose	Facility Metrics	System Access Rights
Microsoft Dynamics GP	The purpose of Microsoft Dynamics GP is to capture all of the city's financial data including revenues, expenses, assets, liabilities and equity. This system is the city's core financial system.	<ul style="list-style-type: none"> <li>Maintenance costs and capital costs</li> <li>Number of vendor invoices for external work orders and capital works</li> </ul>	Finance
Management Reporter	This tool enables City Managers and Directors to compare budget to actuals.	<ul style="list-style-type: none"> <li>Maintenance costs and capital costs</li> </ul>	All departments
PerfectMind	The PerfectMind software is used to book City rooms, ice and other spaces for public use.	<ul style="list-style-type: none"> <li>Utilization by program and room</li> <li>Hours available</li> <li>Hours utilized</li> <li>Number of registrations, etc.</li> </ul>	Community Services
Pearl	The Pearl software is used to track internal work orders, jobs and their associated costs. The software is currently used by the Public Works department only.	<ul style="list-style-type: none"> <li>Number of internal work orders/jobs</li> <li>Cost of internal work orders/jobs including allocations of salaries and benefits, materials etc.</li> </ul>	Public Works
Citywide PSD	This software is used to house an inventory of all city assets including facilities, infrastructure, land and other large capital assets.	<ul style="list-style-type: none"> <li>Inventory of city assets</li> </ul>	Infrastructure and Development Services



# Implementation Plan - Interim Reporting Functional Process & Workflows

As part of the project, KPMG developed a tool in Microsoft Excel to capture and report maintenance costs, work orders and utilization data. City staff can use the tool to analyze their facilities, make operational decisions, find cost savings and perform business case analysis. The tool combines data from various City systems including Microsoft Dynamics Great Plains, PerfectMind and the internal work order registry. Refer to Appendix A for the business process flow chart used to populate this tool with City data.

It is important to note that this tool should only be used temporarily until the City implements all data collection strategy recommendations. This tool, while useful, requires manual labour to populate and does not realize sustainable efficiencies unlike technologies that are available to the City. KPMG recommends that a staff member from each department should own and populate the tool with facility data from 2022.

The recommendations within this report will leverage existing and new software to capture, analyze and report facility maintenance/capital costs, work orders and utilization data – thereby enabling digital transformation for the City of Stratford now and into the future.

## Interim Facility Reporting Tool in MS Excel

**City of Stratford**  
Business Process Review  
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Maintenance & Capital Costs															
	Apples	Auradale Cemetery	City Hall	City Hall Annex Building	Community Services Building	Duffin Arena	Lion's Pool	National Stadium	Normal School	Public Works Garage/Office	Rotary Complex	Tourism	Transit Garage	William Allman Arena	Total
Capital Expenses	\$ -	\$ -	\$ -	\$ 447,701	\$ -	\$ -	\$ -	\$ -	\$ 6,634	\$ -	\$ -	\$ 10,527	\$ -	\$ 110,538	\$ 704,500
Operating Expenses	\$ 383,193	\$ 21,551	\$ 84,500	\$ 52,117	\$ 8,863	\$ 71,520	\$ 13,366	\$ 1,947	\$ -	\$ 22,761	\$ 247,203	\$ 14,557	\$ 30,271	\$ 142,480	\$ 1,235,083
Total Expenses	\$ 383,193	\$ 21,551	\$ 84,500	\$ 499,818	\$ 8,863	\$ 71,520	\$ 13,366	\$ 1,947	\$ 6,634	\$ 22,761	\$ 247,203	\$ 25,084	\$ 30,271	\$ 252,018	\$ 1,939,583

*Spreads and/or input are not currently reflected in the figures above.*  
*These figures (2022) are preliminary and should not be deemed final until an appropriate review has been performed.*  
*Availability of hours and materials not currently available within the financial database.*

Work Orders															
	Apples	Auradale Cemetery	City Hall	City Hall Annex Building	Community Services Building	Duffin Arena	Lion's Pool	National Stadium	Normal School	Public Works Garage/Office	Rotary Complex	Tourism	Transit Garage	William Allman Arena	Total
# of Internal Work Orders	1	1	-	-	-	3	6	2	-	-	3	1	-	5	22
# of Internal Work Order Hours	-	2	-	-	-	5	10	1	-	-	3	2	-	6	38
# of External Work Orders	75	2	-	-	2	34	11	-	-	-	-	-	9	61	253
Internal Work Order Salary Allocation	\$ -	\$ 85	\$ -	\$ -	\$ -	\$ 211	\$ 550	\$ 42	\$ -	\$ -	\$ 137	\$ 85	\$ -	\$ 254	\$ 1,364

*Only refers to internal work order data for Community Services facilities, does not include work order data for the Apples facility as there is no process to collect the data for them.*  
*These figures are preliminary and should not be deemed final until an appropriate review has been performed.*

Utilization							
	Apples	Duffin Arena	Lion's Pool	National Stadium	Rotary Complex	William Allman Arena	Total
Hours Utilized*	10,524	2	564	682	3,436	365	20,573
Hours Available*	123,008	1,512	-	1,320	83,746	7,856	217,442
Utilization	8%	0%	0%	52%	4%	5%	9%

*\*Hours utilized encompasses all rooms; hours available = hours available per room x the number of rooms.*  
*Data quality issues noted for items highlighted in red.*  
*These figures (2022) are preliminary and should not be deemed final until an appropriate review has been performed.*  
*Room rentals separate from low from pool.*  
*Add rooms including the number and name of rooms included above.*

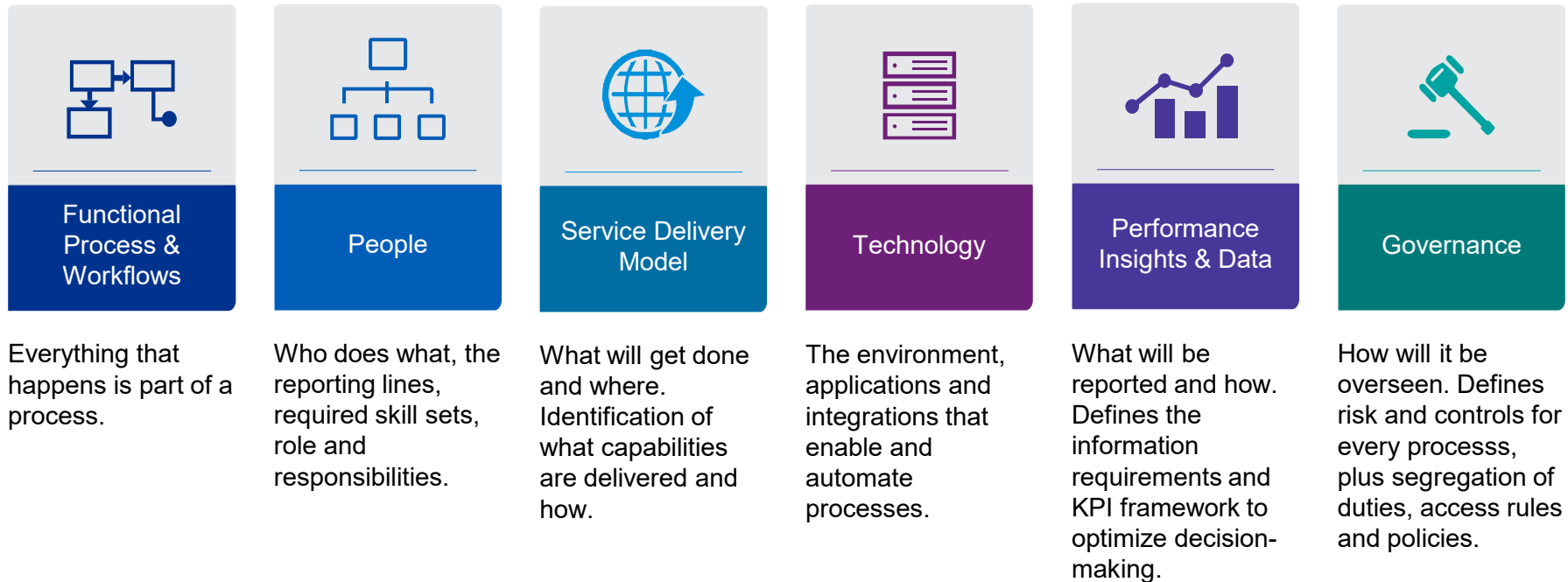
## Software to Replace the Interim Reporting Tool after 2022


Software	Metrics
Microsoft Dynamics & Management Reporter	Maintenance and capital costs
CityWide PSD Module	Work orders
PerfectMind	Utilization

# Observation & Data Collection Strategy

## Data Collection Strategy

KPMG developed a data collection strategy after analyzing the City's business processes spanning the fourteen (14) in-scope facilities. The data collection strategy comprises the key recommendations required to collect, report and analyze facility data and includes the following six (6) dimensions:



KPMG's observations from the business process analysis and corresponding data collection strategy recommendations are presented in the following slides. 

# Functional Process & Workflows

KPMG’s observations from the business process analysis and their corresponding data strategy recommendations are presented below using the six (6) dimensions. These recommendations will enable the City of Stratford to realize facility management efficiencies and cost savings.

Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
People and Governance	1	<p><b>Observation:</b> The City uses a decentralized staffing model to manage maintenance and capital for its facilities. Each department is currently responsible for its own portfolio of buildings, e.g. Community Services, Public Works and Transit etc. We understand that the departments do consult with the Chief Building Official when they plan major capital improvements (10 year needs) for their respective facilities.</p>	<p><b>Recommendation:</b> Consider centralizing facility maintenance, custodial work and capital planning within a single department – with an additional FTE (Supervisor) responsible for the portfolio of all facilities. This position would be responsible for the overall data strategy including data requirements, reporting facility utilization, KPMG’s tracking tool and other reporting to Management as required, along with determining the reporting frequency.</p> <p>KPMG recommends that a staff member from each department (Community Services and Infrastructure and Development Services) should own and populate the tool with facility data from 2022; at least until a new position is approved. The tool should be completed based on a prescribed frequency (for example monthly) and forwarded to Corporate Initiatives for consolidation and reporting.</p> <p><b>Rationale:</b> Using a centralized model will enable consistency in the maintenance and capital improvement of all facilities; will leverage expertise of qualified building staff; and free up staffing resources within the Community Services, Administration, Public Works and Transit departments.</p>	<p>CAO + Corporate Initiatives</p> <p>Community Services + Infrastructure and Development Services</p>

# Observation & Data Collection Strategy

## Functional Process & Workflows

KPMG's observations from the business process analysis and their corresponding data strategy recommendations are presented below using the six (6) dimensions. These recommendations will enable the City of Stratford to realize facility management efficiencies and cost savings.

Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Functional Process & Workflows	2	<p><b>Observation:</b> The Community Services department developed an internal work order tracking process in April 2021. The process is functional and paper-based. However, the process is not in-place within the other departments that also manage facilities, e.g. Administration, Transit etc.</p>	<p><b>Recommendation:</b> Extend the internal work order tracking process across all departments until a software solution is adopted to manage this task. The Public Works department may not require this process as it currently uses Pearl software to manage internal work orders.</p> <p><b>Rationale:</b> Extending this process across all departments will allow the City to track internal work order data for the entire facility portfolio during the interim period until a software solution is adopted for work orders.</p>	Community Services + Infrastructure and Development Services

# Observation & Data Collection Strategy

## Functional Process & Workflows

KPMG’s observations from the business process analysis and their corresponding data strategy recommendations are presented below using the six (6) dimensions. These recommendations will enable the City of Stratford to realize facility management efficiencies and cost savings.

Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Functional Process & Workflows and Technology	3	<p><b>Observation:</b> The internal work order system described in #2 is functional but paper-based, and therefore, cannot be used to generate system reports for management. The process is also disconnected from the City’s asset management plan: staff cannot ascertain the impact of facility work orders upon the condition and lifespan of its assets using this process. The condition and lifespan of assets must be reported under O. Reg 588/17.</p> <p><b>Observation:</b> The City has an asset management plan; however, staff noted the City does not have well-established processes and technology to support asset management activities e.g. creating yearly maintenance plans for all assets, tracking the declining condition of high-risk assets etc.</p>	<p><b>Recommendation:</b> Use Citywide PSD software to track internal (and external) work orders. A new software module must be purchased to enable this functionality, requiring approximately one month for installation.</p> <p>We understand that there is an annual subscription fee for the service; and unlimited users can be added with no additional fee. Currently all buildings and assets are in CityWide Asset Manager module. The Recreation facilities will need to be added to the Work Order portion of the module purchased.</p> <p><b>Rationale:</b> A software solution will ensure consistency in the tracking of work orders across the City and provide reporting capabilities for staff. The Citywide PSD module, in particular, will also enhance the City’s asset management planning activities, e.g. by creating maintenance plans and tracking work orders against them.</p>	Community Services + Infrastructure and Development Services

## Observation & Data Collection Strategy

# Functional Process & Workflows

KPMG's observations from the business process analysis and their corresponding data strategy recommendations are presented below using the six (6) dimensions. These recommendations will enable the City of Stratford to realize facility management efficiencies and cost savings.

Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Performance Insights & Data and Technology	4	<b>Observation:</b> For external work orders, the cost of labour hours and materials is not readily available. Currently, management must retrieve and review invoices to gather this data.	<p><b>Recommendation:</b> Refer to recommendation #3. In addition, consider splitting vendor invoices between labour and materials in Microsoft Dynamics.</p> <p><b>Rationale:</b> The recommendations will allow for simple tracking and reporting of work order data including the breakdown of labour hours and materials.</p>	Community Services + Infrastructure and Development Services
Performance Insights & Data and Technology	5	<b>Observation:</b> Many staff noted they do not have access to financial data (expenditures) on maintenance and capital; however, we understand this data is available from the Management Reporter tool based upon comments from staff interviews.	<p><b>Recommendation:</b> Inform and provide necessary training to staff on the Management Reporter tool and its location on the City's server. Install software on staff computers and grant them access if required.</p> <p><b>Rationale:</b> Managers and staff will be able to analyze facility maintenance and capital expenses (among others) and compare actual spend versus their budgets.</p>	Corporate Services

# Observation & Data Collection Strategy

## Functional Process & Workflows

KPMG’s observations from the business process analysis and their corresponding data strategy recommendations are presented below using the six (6) dimensions. These recommendations will enable the City of Stratford to realize facility management efficiencies and cost savings.

Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Performance Insights & Data and Technology	6	<p><b>Observation:</b> Staff would like to analyze maintenance expenses by sub-category; however, the Microsoft Dynamics GP software only tracks expenses by category. For example, staff cannot distinguish between electrical, HVAC and carpentry expenses – all of which are generally categorized as ‘Building Maintenance’ or ‘Contractors’.</p>	<p><b>Recommendation:</b> Create a new data field in Microsoft Dynamics GP which captures the sub-category. A list of common, standardized sub-categories must be created and shared between finance staff and managers that approve invoices.</p> <p><b>Rationale:</b> This recommendation will enable staff to perform deeper analysis on expenditures (by sub-category) leading to potential cost-savings and efficiencies.</p>	Corporate Services
People and Service Delivery Model	7	<p><b>Observation:</b> The City uses contractors for electrical, plumbing and carpentry services. Stakeholders generally believed in-sourcing one (1) or more of these positions would be more cost-effective than outsourcing. Further analysis is required to make a determination.</p>	<p><b>Recommendation:</b> Perform a cost-benefit analysis to compare insourcing and outsourcing of these positions after the implementation of recommendation #6.</p> <p><b>Rationale:</b> The City may be able to realize cost savings by insourcing some or all of these positions.</p>	Corporate Services

# Functional Process & Workflows

KPMG’s observations from the business process analysis and their corresponding data strategy recommendations are presented below using the six (6) dimensions. These recommendations will enable the City of Stratford to realize facility management efficiencies and cost savings.

Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Performance Insights & Data and Technology	8	<p><b>Observation:</b> Based on feedback from staff, maintenance and capital expenses are overstated and understated for some facilities in the Microsoft Dynamics GP software. This issue arises when the expense is allocated to one (1) facility when, in fact, it should be allocated to two (2) or more facilities based upon the vendor’s invoice. In this scenario, a vendor would have provided service at two (2) or more facilities but only issued one (1) invoice – which would then be allocated to one (1) facility only to reduce processing times.</p>	<p><b>Recommendation:</b> Consider splitting expenses between facilities when they meet a materiality threshold, for example, \$1,000.</p> <p><b>Rationale:</b> The use of a materiality threshold will help to improve the accuracy of financial data without significantly increasing invoice processing times for finance staff. Finance staff already process a large volume of invoices daily.</p>	Corporate Services
Performance Insights & Data and Technology	9	<p><b>Observation:</b> Utilization metrics<sup>1</sup> (%) are available by facility, room and by program from the PerfectMind software. Staff would like to further analyze this data between prime time hours versus non-prime time hours; however, the system is currently not configured to make this analysis.</p> <p>Note<sup>1</sup>: utilization is currently calculated as follows:</p> $Utilization = \text{hours utilized} \div \text{available hours}$	<p><b>Recommendation:</b> Distinguish and add available hours and hours utilized for (a) prime time and (b) non-prime time hours within the PerfectMind software. Moreover, customize a report within the software to calculate two (2) utilization metrics for each facility as a whole: prime time utilization; and non-prime time utilization.</p> <p><b>Rationale:</b> This report will allow management to find cost savings, efficiencies and other uses for spaces that are less productive/utilized.</p>	Community Services



# Observation & Data Collection Strategy

## Functional Process & Workflows

KPMG’s observations from the business process analysis and their corresponding data strategy recommendations are presented below using the six (6) dimensions. These recommendations will enable the City of Stratford to realize facility management efficiencies and cost savings.

Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Performance Insights & Data and Technology	10	<b>Observation:</b> Utilization metrics <sup>1</sup> (%) from the PerfectMind software appear to be understated for some rooms and programs. KPMG noted discrepancies between the available hours in the software and available hours according to conversations with staff and reasonability checks. For example, the available hours for some rooms in the software exceeds 5,600 hours. This entails that some rooms are available for more than 15 hours per day, 7 days per week – which is not the case.	<p><b>Recommendation:</b> Review the available hours for all rooms and programs to ensure their accuracy. Edit these values where necessary to reflect actual operating hours.</p> <p><b>Rationale:</b> These revisions will lead to more accurate calculations of utilization per facility.</p>	Community Services
Performance Insights & Data and Technology	11	<b>Observation:</b> The PerfectMind software does not contain accurate head count data for events and programs based upon notes from staff interviews.	<p><b>Recommendation:</b> Consider adding an estimate or average head count for the event during the booking process.</p> <p><b>Rationale:</b> This recommendation will enable staff to analyze head count data (foot traffic) by facility with a greater degree of accuracy.</p>	Community Services

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Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Performance Insights & Data and Technology	12	<b>Observation:</b> Staff would like to analyze demographics data for public-facing facilities; however, the PerfectMind software is not currently configured to perform this analysis.	<p><b>Recommendation:</b> Explore the capabilities of the PerfectMind software and add demographics data fields for registrations and bookings if possible.</p> <p><b>Rationale:</b> Staff will be able to analyze demographics data across all public-facing facilities and improve service delivery based upon usage by various community groups.</p>	Community Services
Performance Insights & Data and Technology	13	<b>Observation:</b> Not all multi-use fields are currently captured in the PerfectMind software, and therefore, utilization metrics are not available for these fields.	<p><b>Recommendation:</b> Add all multi-use fields to the software along with available hours.</p> <p><b>Rationale:</b> Staff can begin tracking and analyzing utilization for these fields by implementing this recommendation.</p>	Community Services

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Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Performance Insights & Data and Technology	14	<p><b>Observation:</b> Utilization metrics for programs and rooms are not compared in a meaningful way. For example, utilization metrics for rooms are currently compared with utilization metrics for pools and rinks.</p>	<p><b>Recommendation:</b> Group and compare utilization metrics for rooms and programs according to the existing groupings used for budgeting purposes:</p> <ol style="list-style-type: none"> <li>1. Community Halls</li> <li>2. Fieldhouses (Gyms)</li> <li>3. Ice Rentals</li> <li>4. Meeting Rooms</li> <li>5. Pools</li> </ol> <p><b>Rationale:</b> This grouping will enable management to compare utilization metrics in a meaningful way that aligns with the budgeting process.</p>	Community Services

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## Functional Process & Workflows

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Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
People and Governance	15	<p><b>Observation:</b> Based upon stakeholder interviews, staff consistently noted a lack of staffing resources in order to analyze facility data for improved decision-making.</p> <p>A staff member from each department will need to own and oversee the interim reporting tool in MS Excel developed by KPMG and populate it with 2022 data for a successful implementation at the City.</p>	<p><b>Recommendation:</b> Same as recommendation #1 above. The new position will be responsible for owning and overseeing the reporting tool including populating it with updated data.</p> <p><b>Rationale:</b> Staff will have additional time to analyze facility data using a centralized staffing model.</p> <p>The tool will enable staff to analyze financial, work order and utilization data in the interim period until all recommended software configurations are in-place. Assigning staff to own and populate the tool with data will increase the likelihood of its implementation and use at the City of Stratford.</p>	<p>CAO + Corporate Initiatives</p>

# Observation & Data Collection Strategy

## Functional Process & Workflows

KPMG’s observations from the business process analysis and their corresponding data strategy recommendations are presented below using the six (6) dimensions. These recommendations will enable the City of Stratford to realize facility management efficiencies and cost savings.

Strategy Dimension	#	Business Process Observations	Data Collection Strategy - Recommendations	Owner
Service Delivery Model	16	<p><b>Observation:</b> Staff noted that historically there has been insufficient funding for capital improvements and the maintenance of facilities within the City’s portfolio.</p>	<p><b>Recommendation:</b> Consider the disposition of under-utilized and less functional facilities using KPMG’s interim reporting tool or system reports after implementing the data collection strategy recommendations contained within this report.</p> <p><b>Rationale:</b> Consolidating the City’s facility portfolio will significantly improve the maintenance of key facilities (including accessibility and efficiency retrofits) and increase contributions to facility reserves – thereby creating a model for long-term facility sustainability.</p>	<p>CAO + Corporate Initiatives</p>



# Implementation Plan

**City of Stratford**  
**Business Process Review**  
**Final Report**



# Implementation Plan

## High-Level Implementation Plan

KPMG also developed a high-level implementation plan for the data collection strategy recommendations outlined in this report. Below, the recommendations have been prioritized in a rational and systematic way for the City of Stratford.

Actions			Implementation Timeline							
			2022				2023			
Recommendation Reference #	Recommendation	Owner	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1	Consider implementing a centralized staffing model for facility maintenance	CAO + Corporate Initiatives			Q3	Q4	Q1	Q2		
2	Extend the internal work order tracking process across all departments	Community Services	Q1	Q2						
3,4	Acquire, implement and configure the Work Order module for the City's PSD CityWide software	Community Services + Infrastructure and Development Services			Q3	Q4	Q1	Q2	Q3	

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Actions			Implementation Timeline								
Recommendation Reference #	Recommendation	Owner	2022				2023				
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
5	Inform/train staff of the Management Reporter tool and its location on the City's server. Install the software on staff computers and grant them access if required.	Corporate Services	Q1	Q2							
6,8	Add data fields to customize the Microsoft Dynamics GP software and improve the reporting of facility maintenance costs	Corporate Services	Q1	Q2							
7	Perform a cost-benefit analysis to compare insourcing and outsourcing of these HVAC, electrical and carpentry positions	Corporate Services					Q1				



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Actions			Implementation Timeline							
			2022				2023			
Recommendation Reference #	Recommendation	Owner	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
9-14	Configure the City's PerfectMind software to enable accurate tracking and reporting of utilization metrics	Community Services	Q1	Q2						
15	Update and populate the interim reporting tool with data from 2022. Refer to Appendix A for further detail.	Staff member from each department including Community Services, Transit, Public Works etc.	Q1	Q2	Q3	Q4	Q1			
16	Consider the disposition of under-utilized and less functional facilities using KPMG's interim reporting tool or system reports after implementing the data collection strategy recommendations contained within this report.	CAO + Corporate Initiatives					Q1			



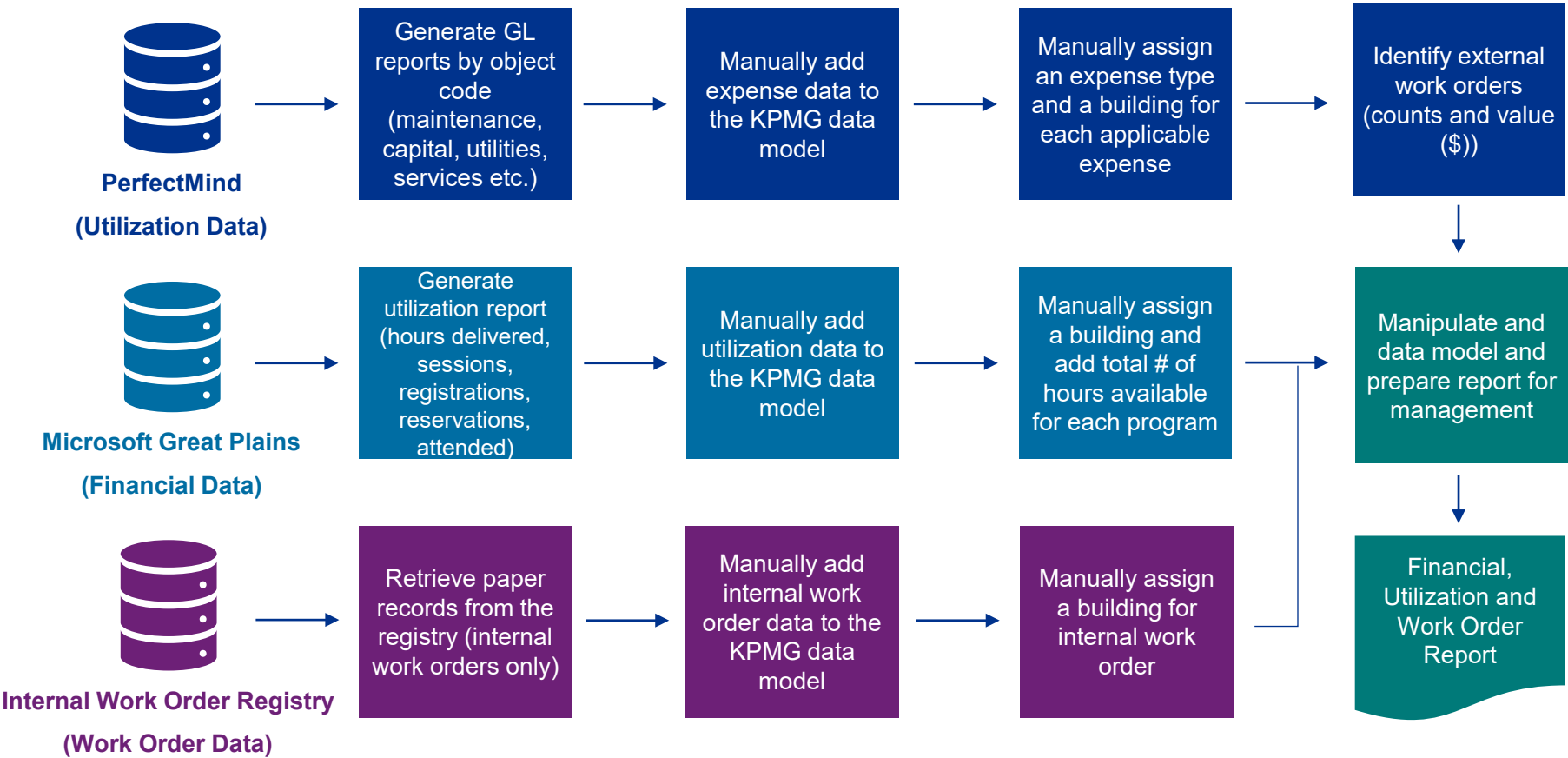
# Appendix A

**City of Stratford**  
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# Interim Reporting Process Flow Chart

KPMG created a data model to consolidate financial, work order and utilization data from various systems at the City of Stratford. The process flow chart shown below depicts the interim process workflow to create the data model until the City can realize the recommended future state.





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