



City of Owen Sound Kate Allan, Corporate Services 2025 Individual Workplan

Section 1: Project Information

Section 2: Core Service Tasks

Section 3: Employee Engagement Activities

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Section 1: Project Information

Project Title: Complete City Wide Conversion to Radio Meters - Sponsor

Project Status: Proceeding as Anticipated

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Update all water meters to remote radio meters Service review SR 3a5 Stakeholders Affected: Water Billing, Neptune, Water Meter Support	People: Lara - Lead Approved Budget: 3,500,000 Other: Click or tap here to enter text.	Risk(s): Per Charter Mitigation(s): Click or tap here to enter text.	Project Milestones: Delivery of business case Procurement Timing: RFP for conversion awarded Completion Date: December 31, 2027

Project Title: Implement a Project Management System - Sponsor

Project Status: Proceeding as Anticipated

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Develop or procure an automated project management system that consolidates various Excel templates currently used for project management and reporting. Stakeholders Affected: All Staff	People: Michelle – Lead, Mark, Chris Webb, Shawn Dubosq, Sierra, Bradey, Karen G Approved Budget: \$100K Other: Click or tap here to enter text.	Risk(s): Per Charter Mitigation(s): Click or tap here to enter text.	Project Milestones: Delivery of product, pilot group kickoff Identify Procurement Timing: RFP awarded to Solutions Guidance Corp Completion Date: Spring 2025

Project Title: Identify Manual Processes through 1a6 that could be digitized through mobile tech - Sponsor

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
From the deployment map, as well as the initial training of staff, develop a repository of processes to improve with a methodology for prioritization and roll-out Train all staff (2024-2026) and embed into onboarding program Stakeholders Affected: All Staff	People: Michelle Palmer (lead), Greg Nicol, Carly, Kim, Wade, Scott, Tyler Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Risk(s): Per Charter Mitigation(s): Click or tap here to enter text.	Project Milestones: Completion of 1a6, implement LEAN principles. Report to committee in the spring Procurement Timing: n/a Completion Date: Post 2026

Project Title: Develop Customer Service Strategy - Sponsor

Project Status: Proceeding as Anticipated

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Develop a customer service strategy that aims to improve the experience of residents, internal staff and visitors. Stakeholders Affected: all staff, residents and users.	People: Christine Gilbert (lead), Michelle, Crystal, Sierra, Kim, Heidi, Andy, Nicole, Amanda Approved Budget: n/a Other: Click or tap here to enter text.	Risk(s): per charter Mitigation(s): Click or tap here to enter text.	Project Milestones: The first phase is internal customer service. The second phase is external customer service. Procurement Timing: Click or tap here to enter text. Completion Date: Phase 1: March 31, 2026. Phase 2 Post 2027.

Project Title: Transition to Multi-Year Operating Budget

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Transition to a multi year operating budget to achieve sustainable increases over a longer time horizon. Stakeholders Affected: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Risk(s): Click or tap here to enter text. Mitigation(s): Click or tap here to enter text.	Project Milestones: To implement for first approval in second term of Council (2028-2032 budget) Procurement Timing: Click or tap here to enter text. Completion Date: December 2027

Project Title: Implement Change Management Templates - Sponsor

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Implement Project and Change Management Templates through the utilization of standard tools (RACI) and practices for all project leads and other appropriate levels of the organization. SR 1b3 Stakeholders Affected: Click or tap here to enter text.	People: Michelle Palmer (lead) Spencer, DVD, Mark Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Risk(s): Click or tap here to enter text. Mitigation(s): Click or tap here to enter text.	Project Milestones: Kickoff Q4, 2025 Procurement Timing: Click or tap here to enter text. Completion Date: Q3, 2026

Project Title: Explore a business case for a dedicated staff position focused on grant applications - Lead

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Explore a business case for a dedicated staff position focused on grants applications and reporting. Stakeholders Affected: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Dedicated position for grants person included as part time at the TOM. Consider enhancing position to apply for grant for all City Divisions.	Risk(s): Council Support Mitigation(s): Comprehensive Business Case	Project Milestones: Kickoff Q2 2025 Procurement Timing: Click or tap here to enter text. Completion Date: Q3, 2025

Project Title: Develop an Allocation Policy regarding internal costs to enhance transparency of gross costs vs levy requirements

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Click or tap here to enter text. Develop an allocation policy regarding internal costs to enhance the transparency of gross costs vs. levy requirement costs. Stakeholders Affected: Click or tap here to enter text.	People: Tim (sponsor), Ashley, Nicole, Christine Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Risk(s): Lack of suitable technology Mitigation(s): investigate Euna Budget solutions	Project Milestones: Kick off Q2 2025 Procurement Timing: Click or tap here to enter text. Completion Date: Q4, 2025

Project Title: 2050 Vision Action Items - TBA

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority
- Master Plan
- Committee or Council Request
- Legislated
- Capital Project
- Service Review Action
- Policy Review Project
- Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
- RACI
- N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
2050 Vision Action items TBA Stakeholders Affected: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Risk(s): Click or tap here to enter text. Mitigation(s): Click or tap here to enter text.	Project Milestones: Click or tap here to enter text. Procurement Timing: Click or tap here to enter text. Completion Date: Phase 1: March 31, 2026. Phase 2 Post 2027.

Project Title: Revised Fees and Charges Process - Sponsor

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Revise fees and charges process to a comprehensive cyclical cycle Stakeholders Affected: Council, Public, Staff	People: Christine Gilbert (lead), KVA, Lara, Pam Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Risk(s): Click or tap here to enter text. Mitigation(s): Click or tap here to enter text.	Project Milestones: Click or tap here to enter text. Procurement Timing: kickoff for fall of 2025 Completion Date: March 3, 2026

Project Title: Implement Euna Budgeting Solution

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: benefits core service

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Implement Euna budgeting software to replace excel based budget Stakeholders Affected: All Staff, Council, Public facing	People: Eckhard, Lara, Christine Approved Budget: TBA Other: Click or tap here to enter text.	Risk(s): Click or tap here to enter text. Mitigation(s): Click or tap here to enter text.	Project Milestones: Aim to compete in time for 2027 Budget development (I.E. SPRING OF 2026) Procurement Timing: Click or tap here to enter text. Completion Date: Q2 2026

Project Title: Beyond SHARE - Sponsor

Project Status: Proceeding as Anticipated

Project Rationale (select all that apply):

- Strategic Priority
 Master Plan
 Committee or Council Request
 Legislated
 Capital Project
 Service Review Action
 Policy Review Project
 Other: staff identified

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Two phase project. 1. Current state assessment 2. Improvement actions implementation Stakeholders Affected: SHARE users	People: KimS (Lead), DVD, Mark Approved Budget: from transformation budget Other: Click or tap here to enter text.	Risk(s): staff making time to participate Mitigation(s): support from SLT.	Project Milestones: Phase 1 kickoff February 17, 2025 Procurement Timing: Click or tap here to enter text. Completion Date: Phase 1 completion Q2 2025. Phase 2 Q3 2025 to Q4 2027

Project Title: Create a donations policy

Project Status: Not Yet Commenced

Project Rationale (select all that apply):

- Strategic Priority Master Plan Committee or Council Request Legislated
 Capital Project Service Review Action Policy Review Project Other: Click or tap here to enter text.

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter RACI N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Develop a corporate donation policy to govern how we accept donations Stakeholders Affected: Click or tap here to enter text.	People: KVA Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Risk(s): Click or tap here to enter text. Mitigation(s): Click or tap here to enter text.	Project Milestones: Click or tap here to enter text. Procurement Timing: Click or tap here to enter text. Completion Date: Q4, 2025

Section 2: Core Service Tasks

To add another row, click inside the last row and then click the 'blue +' symbol that appears at the bottom right of the table.

Task Name	Description	Resources	Key Performance Indicators
Corporate Services Committee Staff Lead	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Review escribe reports for financial implications	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Weekly tactical, month and quarterly SLT Meetings	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Develop Annual Operating Budget (lead)	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text.	Click or tap here to enter text.

		Other: Click or tap here to enter text.	
Annual Water rate update (transition to Natalie)	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Annual Capital plan – sponsor Annual capital plan funding (lead)	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Annual Year End Audit - sponsor	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
T1 – 3 Financial Updates	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Year End Report(lead)	Click or tap here to enter text. Stakeholder:	People: Click or tap here to enter text.	Click or tap here to enter text.

	Click or tap here to enter text.	Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	
Tax Policy and Ratio – Lead)	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Beyond SHARE - Sponsor	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Record and Allocate MAT	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
River District annual Budget and public meeting	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.

River District annual mid year end year end report	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Development Charges oversight and annual report	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Reserves tracking and reporting (lead)	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Investment Administration	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
Debenture Administration	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text.	Click or tap here to enter text.

		Other: Click or tap here to enter text.	
Policy Update Project (reviewer)	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.
One on One meetings with Staff	Click or tap here to enter text. Stakeholder: Click or tap here to enter text.	People: Click or tap here to enter text. Approved Budget: Click or tap here to enter text. Other: Click or tap here to enter text.	Click or tap here to enter text.