



City of Owen Sound

City Clerk 2025 Individual Workplan

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Section 2: Core Service Tasks

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Section 1: Project Information

Project Title: Service Review 1a5 – Review Civil Marriage Program

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
Cost and efficiency savings Stakeholders Affected: The public who use the service and tax payers who benefit from revenue generated by service	People: Marriage & Licensing Coordinator, Manager of Legislative Services, Payroll Specialist, Mgr. of Strategic Initiatives Approved Budget:\$0 Other: I'm the team lead	Risk(s): Core Tasks and other projects Mitigation(s): Time management.	Project Milestones: 2024/Q1 2025 data collection and research Q2 2025 Report to Committee Procurement Timing: N/A Completion Date: Q2 2025

Project Title: Service Review 1c5 – Proactive By-law Enforcement Model Review

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
Efficiency and dollar savings Stakeholders Affected: The public	People: CBO, Fire Chief, By-law Officers Approved Budget: \$0 Other: I'm the team lead	Risk(s): Core Tasks and other projects Mitigation(s): Time management	Project Milestones: 2024/Q1 2025 research Q3 2025 Report to Committee Procurement Timing: N/A Completion Date: Q3 2025

Project Title: STR Program Review

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
Successful licensing program Stakeholders Affected: STR Operators, renters	People: STR Coordinator, Manager of Legislative Services, By-law Officers, CBO, Planning staff Approved Budget: Other: Click or tap here to enter text.	Risk(s): Core Tasks and Projects Mitigation(s): Time Management	Project Milestones: Q1 gather statistics Q2 Report to Committee Procurement Timing: N/A Completion Date: 2025-06-28

Project Title: Review of Board and Committee Structure

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: City Manager Request

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter RACI N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Up to date structure that coincides with Vision 2050 priorities Stakeholders Affected: Community, staff	People: SLT, Manager of Legislative Services, Deputy Clerk Approved Budget: \$0 Other: Click or tap here to enter text.	Risk(s): Core Tasks and Projects Mitigation(s): Time Management	Project Milestones: Q3 2025 report to Committee Procurement Timing: N/A Completion Date: 2025-10-04

Project Title: Service Review 4a1 – KPIs and Revenue Targets

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
Standard process and KPIs identified Stakeholders Affected: The public, staff	People: Director of Corporate Services, Manager of Strategic Initiatives, Arena Manager, Facility Booking Coordinator Approved Budget: \$0 Other: I am a team member	Risk(s): Core tasks and projects Mitigation(s): Time management	Project Milestones: Q1 2025 develop draft process, SLT review, report to Committee Q2 2025 launch process to staff Procurement Timing: N/A Completion Date: Q4 2025

Project Title: Service Review 4c4 – User-Fee Annual Review Policy Project

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
Consistent approach to fee review Stakeholders Affected: The public and staff	People: Fire Chief, CBO, Manager of Legislative Services, Manager of Engineering Services Approved Budget: \$0 Other: I am part of the team	Risk(s): Core tasks and projects Mitigation(s): Time management	Project Milestones: Q1 2026 project set to begin. There may be some meetings in late 2025 to review project. Procurement Timing: Click or tap here to enter text. Completion Date: Q3 2026

Project Title: Service Review 3a6 – Increase and Expand Use of Online Services

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
Efficiencies for public and staff Stakeholders Affected: The public and staff	People: Front line staff Approved Budget: \$0 Other: I am part of the team	Risk(s): Core Tasks and projects Mitigation(s): Time management	Project Milestones: Q1 2024 start expanding use of online services Procurement Timing: Click or tap here to enter text. Completion Date: Q4 2026

Project Title: New Position - Committee Services Coordinator

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: City Manager requested

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Organizational efficiencies, stronger Clerk presence at Committee meetings, admin support for Mayor and City Manager Stakeholders Affected: Committees, public, Recording Secretaries	People: Clerks Team, Recording Secretaries, HR, IT Approved Budget: \$90K Other: Click or tap here to enter text.	Risk(s): Core tasks and projects Mitigation(s): Time management	Project Milestones: Q1 2025 Create job description Q3 post job and hire candidate Procurement Timing: Click or tap here to enter text. Completion Date: Q4 2025

Project Title: Parking Updates

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
<p>Update parking policies</p> <p>Other parking updates are needed i.e. increase to set fines, better signage, etc. but staff resources are limited</p> <p>Stakeholders Affected: Public, visitors</p>	<p>People: Manager of Legislative Services</p> <p>should time permit and additional time can be spent on parking, it would require support from I.T., Public Works, Deputy Treasurer, Communications</p> <p>Approved Budget: \$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Risk(s): Staff resources</p> <p>Mitigation(s):</p>	<p>Project Milestones: Policies updated Q2 2025</p> <p>Procurement Timing: Click or tap here to enter text.</p> <p>Completion Date: 2025</p>

Project Title: Use of Municipal Resources During Elections 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
Review policy to make sure it is up to date in advance of the 2026 election Stakeholders Affected: Election candidates	People: Manager of Legislative Services, Deputy Clerk Approved Budget: \$0 Other: Click or tap here to enter text.	Risk(s): Core tasks and projects Mitigation(s): Time management	Project Milestones: Updates made by end of 2025 Procurement Timing: Completion Date: 2025

Project Title: 2026 Election

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
Prepare for the 2026 Election Stakeholders Affected: Public	People: Clerks Team, IT Approved Budget: \$80,000 Other: Click or tap here to enter text.	Risk(s): Core tasks and projects Mitigation(s): Time Management	Project Milestones: 2025 draft project plan Procurement Timing: Completion Date: 2027

Project Title: 2026 Inaugural Meeting

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
Plan for Inaugural Council meeting. Stakeholders Affected: Council and public	People: Clerks Team, Events Team, IT, City Manager, Communications Approved Budget: \$5,000 Other: Click or tap here to enter text.	Risk(s): Core tasks & projects Mitigation(s): Time management	Project Milestones: Project plan created by Q1 2026 Procurement Timing: Click or tap here to enter text. Completion Date: 2026-11-16

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
Council and Committee minutes	<p>Review Council and Committee minutes to ensure clarity and consistency across organization.</p> <p>Take the minutes at confidential meetings where only the Clerk is present.</p> <p>Stakeholder: Council, Committee, staff, public</p>	<p>People: Recording Secretaries</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Clear, consistent minutes</p> <p>Number of times agendas need to be re-published to fix minutes.</p>
Staff Report Recommendations	<p>Review all Council and Committee staff report recommendations to ensure clarity and consistency across organization</p> <p>Stakeholder: Council, Committee, staff, public</p>	<p>People: Report Writers</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Clear and consistent report recommendations</p>
Attend Council meetings and Corporate Services Committee meetings (as necessary)	<p>Attend and prepare speaking notes for report presentations</p> <p>Stakeholder: Council, Committee, public</p>	<p>People: Clerk</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of meetings missed</p>

<p>Council Agendas</p>	<p>Assist in the preparation and review of Council meeting agendas</p> <p>Facilitate/attend agenda review meetings with SLT and the Mayor</p> <p>Review all by-laws</p> <p>Stakeholder: Council, public, staff</p>	<p>People: Clerk, Deputy Clerk, SLT</p> <p>Approved Budget:\$0</p> <p>Other: There is a budget should snacks or meals be required for meetings</p>	<p>Number of times agenda needs to be re-published</p>
<p>Action Tracking</p>	<p>Ensure that action tracking spreadsheet is populated by Deputy Clerk and Recording Secretaries</p> <p>Review document quarterly with SLT</p> <p>Stakeholder: Council, Committee, public, staff</p>	<p>People: Deputy Clerk, Recording Secretaries, SLT</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of items tracked</p> <p>Reduction in the number of outstanding reports</p>
<p>Boards and Committees</p>	<p>Provide training to members</p> <p>Support the Deputy Clerk in selections and appointments</p> <p>Support Recording Secretaries with procedural matters</p> <p>Stakeholder: Council, Committee, public</p>	<p>People: Deputy Clerk, Recording Secretaries, SLT</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of vacancies</p>

Recording Secretary Group	<p>Facilitate quarterly meetings</p> <p>Keep them informed of procedural updates</p> <p>2025 back-up schedule</p> <p>Stakeholder: Council, Committee, public</p>	<p>People: Deputy Clerk, Recording Secretaries</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Quarterly meetings completed</p>
Business Licences	<p>Review and sign business licences</p> <p>Stakeholder: Business owners</p>	<p>People: Marriage and Licensing Coordinator</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of licenses issued</p>
FOI	<p>Review response letters, collaborate on redactions, escalate matters to Head and City Manager as necessary</p> <p>Stakeholder: Requesters, staff</p>	<p>People: Information and Privacy Coordinator, Manager of Legislative Services, staff required to gather records</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Number or requests responded to within the 30 day MFIPPA timeframe</p> <p>Number of appeals</p>
Records Management	<p>Review records for disposition, assist Information and Privacy Coordinator where required</p> <p>Beyond SHARE project</p> <p>Stakeholder: Staff</p>	<p>People: All staff</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of records disposed of in accordance with City's Records and Retention By-law</p> <p>All divisions completed records disposition</p>

<p>Vital Statistics</p>	<p>Review monthly burial permit invoices</p> <p>Support marriage licensing and Civil Marriage program where required</p> <p>Stakeholder: Public, Funeral Homes</p>	<p>People: Marriage and Licensing Coordinator</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of invoices submitted on time</p> <p>Number of death registrations completed</p> <p>Number of Form 17s entered</p> <p>Amount of revenue</p>
<p>Animal Control</p>	<p>Support the Deputy Clerk in managing the contract and drafting yearly report.</p> <p>Respond to higher level concerns/complaints</p> <p>Stakeholder: Public, contractor</p>	<p>People: Deputy Clerk, Manager of Corporate Services, Deputy Treasurer</p> <p>Approved Budget:\$135K</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of animal control complaints</p>
<p>Parking/Crossing Guards</p>	<p>Respond to high level parking ticket and crossing guard complaints</p> <p>Liaise with contractor</p> <p>Respond to staff inquiries</p> <p>Stakeholder: Public, staff, contractor</p>	<p>People: Marriage & Licensing Coordinator, Deputy Treasurer, Engineering, By-law Enforcement</p> <p>Approved Budget:\$200K</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of parking complaints</p> <p>Parking ticket revenue</p> <p>Number of crossing guard complaints</p>
<p>Fees and Charges Review</p>	<p>Review applicable Clerks and/or By-law fees</p> <p>Stakeholder: Public</p>	<p>People: Clerks and By-law</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Fees reviewed on schedule</p>

Budget	<p>Provide assistance to Finance team relating to the Clerks, By-law, Parking, Crossing Guard and Animal Control budgets</p> <p>Stakeholder: Public, staff</p>	<p>People: Clerks and By-law Teams</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Accurate budget</p> <p>Deadlines met</p>
Land sales	<p>Support staff with land sale matters</p> <p>Stakeholder: Public</p>	<p>People: Director of Community Services, Manager of Legislative Services, Development Team</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	Number of land sales
Clerks and By-law Team Meetings	<p>Regular Team Meetings</p> <p>Stakeholder: Staff</p>	<p>People: Clerks and By-law Teams</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	Number of meetings held
Council, public and staff inquiries	<p>Respond to questions relating to process, searches, closed sessions, etc.</p> <p>Stakeholder: Council, public, staff</p>	<p>People: Clerk</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	Responses provided within 3-5 business days

<p>By-law Enforcement</p>	<p>Support Officers. Manage higher level complaints. Respond to calls from Council.</p> <p>Yearly report</p> <p>Issue media releases</p> <p>Recruit, interview, hire, student</p> <p>Stakeholder: Public</p>	<p>People: By-law, Communications</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>Number of complaints responded to</p> <p>Compliance rate</p>
<p>Invoices</p>	<p>Approve Clerks and By-law invoices</p> <p>Complete monthly Visa statements</p> <p>Stakeholder: Payees</p>	<p>People: Information and Privacy Coordinator, Finance Team</p> <p>Approved Budget:\$0</p> <p>Other: Click or tap here to enter text.</p>	<p>No late fees</p>