



City of Owen Sound

Manager of Corporate Services 2025 Individual Workplan

Section 1: Project Information

Section 2: Core Service Tasks

Section 3: Employee Engagement Activities

Section 4: Professional Development

Section 5: Performance Reviews

Section 1: Project Information

Project Title: 2025 Asset Management Plan

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
Combine the 2022 and 2024 Asset Management Plans into a new document that focuses on current levels of service and in compliance with O. Reg 588/17. Stakeholders Affected: Asset Management Steering Committee (AMSC) SLT Council	People: Capital Asset and Risk Management Coordinator Approved Budget: N/A Other: N/A	Risk(s): Availability and commitment to project from user departments Mitigation(s): Regular scheduled meetings to review progress and monitor schedule	Project Milestones: Corporate Services Committee – June 12, 2025 Council – July 7, 2025 Procurement Timing: N/A Completion Date: July 7, 2025

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Project Title: Asset Management Levels of Service

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
Council and Public Engagement to support the establishment of Levels of Service for City Assets to support the 2025 Asset Management Plan Stakeholders Affected: User Departments Council Ratepayers	People: Bradey Carbert Capital Asset and Risk Management Coordinator Communications Advisor Approved Budget: N/A Other: N/A	Risk(s): Lack of Community Involvement Mitigation(s): Utilize support of Communications Advisor	Project Milestones: TBD – Need to consult with Communications Advisor Procurement Timing: N/A Completion Date: 2025-04-30

Project Title: Asset Management Lifecycle Management Profiles

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
For each asset category, determine lifecycle activities and associated costs that would need to be undertaken to maintain the proposed levels of service based on an assessment of the following: i. The full lifecycle of the assets. ii. The options for which lifecycle activities could potentially be undertaken to maintain the current levels of service. iii. The risks associated with the options referred to in subparagraph ii. iv. The lifecycle activities referred to in subparagraph ii that can be undertaken for the lowest cost to maintain the current levels of service.	People: Bradey Carbert Capital Asset and Risk Management Coordinator Approved Budget: N/A Other: N/A	Risk(s): Availability and commitment to project from user departments Mitigation(s): Regular scheduled meetings to review progress and monitor schedule	Project Milestones: Kick-off – February 2025 Corporate Services Committee – June 12, 2025 Council – July 7, 2025 Procurement Timing: N/A Completion Date: 2025-07-07

Stakeholders Affected: AMSC			
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Project Title: Purchasing Policy Update

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
Review and update Purchasing Policy to reflect best practices and current City operations. Stakeholders Affected: User Departments Managers SLT	People: Lead: Bradey Carbert Resource: Lauren Stewart Support: User Departments Approved Budget:N/A Other:N/A	Risk(s):Availability and commitment to project from user departments Mitigation(s):Consultation and follow-up	Project Milestones: Corporate Services Committee – March 6, 2025 Council – March 24, 2025 Procurement Timing: N/A Completion Date: March 31, 2025

To insert another project, click this text, and then click the 'blue +' symbol that appears at the bottom right of this text area.

Project Title: Asset Management Policy Update

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
<p>O. Reg. 588/17 requires the City’s Asset Management Policy to be updated every five years. This is due in 2025.</p> <p>Stakeholders Affected: Asset Management Steering Committee SLT Clerk’s office</p>	<p>People: Bradey Carbert Capital Asset and Risk Management Coordinator Manager of Legislative Services</p> <p>Approved Budget: N/A</p> <p>Other: N/A</p>	<p>Risk(s):N/A – Policy requirements are pretty prescriptive</p> <p>Mitigation(s): N/A</p>	<p>Project Milestones: AMSC Review – March 2025 Corporate Services Committee – June 12, 2025 Council – July 7, 2025</p> <p>Procurement Timing: N/A</p> <p>Completion Date: 2025-07-07</p>

Project Title: Implement Facility Service Level Agreements with Lease Holders

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: Internal Process
 Development

Identify if a Project Charter or RACI Has Been Completed:

- Project Charter
 RACI
 N/A

SMART Goal (Description)	Resources	Risks and Mitigation	Milestones
Develop Service Agreements with "lease holders" for City properties that have budgets that are not controlled by Corporate Services Stakeholders Affected: Lease Holders	People: Lead: Bradey Carbert Resource: Derek Christie Resource: Shawn Dubosq Resource: Lease Holders Resource: Pam Coulter Resource: Andy OLeary Approved Budget: N/A Other: N/A	Risk(s): The use of the Agreement will require support from Lease Holders in order for the project to be successful. Agreements will also need to match Lease Agreements that are in place. Mitigation(s): Allow time for lease holders to review and provide comment	Project Milestones: Pilot Agreement – OSPS by September 30, 2025, other locations to follow by year end Procurement Timing: N/A Completion Date: 12/31/2025

To insert another project, click this text, and then click the 'blue +' symbol that appears at the bottom right of this text area.

Project Title: 1D.1 – Fleet Strategy Implementation

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
Participate in the implementation of the Fleet Management Strategy including streamlining and standardizing current fleet management practices within the City Stakeholders Affected: User Departments	People: Lead: Phil Eagleson Resource: Bradey Carbert Approved Budget: N/A Other: N/A	Risk(s): Availability and commitment to project from user departments Mitigation(s): Regular scheduled meetings to review progress and monitor schedule	Project Milestones: TBD Procurement Timing: N/A Completion Date: TBD

Project Title: 4C.2 – Agreement Renewal Policy

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
Support the creation of a policy that will, at the time of new/renewal of Agreements the agreement updated with a report to Council and identifies: alternative methods of service delivery, cost of the agreement, and negotiating parameters. Stakeholders Affected: Various Stakeholders	People: Lead: Kristen Van Alphen Resource: Bradey Carbert Approved Budget: N/A Other: N/A	Risk(s): Availability and commitment to project from user departments Mitigation(s): Regular scheduled meetings to review progress and monitor schedule	Project Milestones: 2025-03-31 Procurement Timing: N/A Completion Date: 2025-03-31

Project Title: 2025 Building Condition Assessments

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
Completion of building condition assessments on City facilities that were not included in the 2024 project to help develop asset management plan and multi-year capital plan Stakeholders Affected: User Departments Lease Holders	People: Lead: Bradey Carbert Resource: Shawn Dubosq Resource: Derek Christie Approved Budget: \$50,000 Other: N/A	Risk(s): Restricted access due to winter weather Mitigation(s): Make necessary adjustments with successful proponent	Project Milestones: Procurement – January Inspections – February / March Report - April Procurement Timing: 15-Jan-25 Completion Date: 2025-04-30

To insert another project, click this text, and then click the 'blue +' symbol that appears at the bottom right of this text area.

Project Title: Climate Strategy Implementation – Assess Facility Capacity for the installation of EV Charging Stations

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: Climate Strategy

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. Assess facility capacity for integrating electric vehicle infrastructure and incorporate into facility retrofits. Stakeholders Affected: Facility Managers	People: Bradey Carbert Shawn Dubosq Ryan Gowan Eckhard Pastrok Jeff Follis Approved Budget: Included in BCA project budget Other: Click or tap here to enter text.	Risk(s): Availability and commitment to project from user departments Mitigation(s): Regular scheduled meetings to review progress and monitor schedule	Project Milestones: Assessments in Spring 2025 Report in Summer 2025 Procurement Timing: N/A -Single Source through Collaborative Procurement Completion Date: 2025-09-30

To insert another project, click this text, and then click the 'blue +' symbol that appears at the bottom right of this text area.

Project Title: Capital Project 24U.4 – Fire Station Renovation/Expansion

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
Commence detailed design and required assessments for the renovation and expansion of the fire station in order for construction to commence in 2026. Stakeholders Affected: Architect Fire Service	People: Bradey Carbert Phil Eagleson Shawn Dubosq Kevin Linthorne Kayla Hyndman Senior Planner Approved Budget: \$385,000 Other: N/A	Risk(s): Budget Constraints Scope of Work Constraints Mitigation(s): Utilize experience and knowledge of the project team to conduct planning exercises	Project Milestones: RFP Development – January to March 2025 Design Commencement – June 2025 Procurement Timing: April 2025 Completion Date: 2027-12-31

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Section 2: Core Service Tasks

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Task Name	Description	Resources	Key Performance Indicators
Corporate Multi-year Capital Plan Development and Maintenance	Lead the development and maintenance of the City's annual and long-term capital budgets. Stakeholder: Internal Staff Lease Holders Council Ratepayers	People: Lead: Bradey Carbert Resource: Kate Allan Resource: Sheyenne Hooghiem Resource: Karen Galbraith Support: User Departments Approved Budget: N/A Other: N/A	Capital budget that meets City's service delivery and asset management requirements but also highlights funded and unfunded projects.
Departmental Capital Budget Development and Maintenance	Lead the development and maintenance of the Corporate Services annual and long-term capital budgets. Stakeholder: Internal Staff	People: Lead: Bradey Carbert Resource: Derek Christie Resource: Shawn Dubosq Approved Budget: N/A Other: N/A	Capital budget that meets City's service delivery and asset management requirements but also highlights funded and unfunded projects.
Departmental Operating Budget Development	Analyze current operating programs and expenditure for the development of 2024 operating budget. Stakeholder: Internal Staff Lease Holders	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.	Operating budget that meets approved service levels

	Council Ratepayers		
Annual Audit Support	Support the Annual Audit process with respect to TCA, Purchasing, and Insurance. Stakeholder: Click or tap here to enter text.Click or tap here to enter text.	People: N/A Approved Budget: N/A Other: N/A	Production of documentation to support annual financial requirements and as requested by municipal auditor.
Annual Insurance Policy Renewal	Analyze current policy coverage and update required schedules for annual insurance renewal. Stakeholder: Internal Staff Council	People: Asset and Risk Management Coordinator Approved Budget: +/- \$800,000 Other: N/A	Renewal of insurance policy with minimal increase and similar coverage.
Asset Database Development / Maintenance and Condition Ratings	Further refinement of core asset databases and confirm condition systems and ratings. Develop asset databases for non-core assets and confirm condition systems and rating. Stakeholder: Internal Staff	People: Lead: Sheyenne Hooghiem Resource: Bradey Carbert Support: AMSC Support: User Departments Approved Budget: N/A Other: N/A	Accurate database is a key component of the asset management plan development and program.
External Service Contract Review	Review existing external service agreements to ensure compliance and value is still being achieved Stakeholder: Internal Staff	People: Lead: Bradey Carbert Resource: Derek Christie Resource: Shawn Dubosq Resource: Contractors Approved Budget:	Annual review of External Service Contracts

	Lease Holders External Contractors	Various Other: N/A	
Purchasing Support	General Support to the Purchasing & Claims Coordinator for all procurement. Stakeholder: User Departments	People: Lead: Bradey Carbert Resource: Lauren Stewart Resource: User Departments Approved Budget: N/A Other: N/A	Legislated compliance and best value for City operations and projects.