

Staff Report

Report To: Service Review Implementation Ad Hoc Committee
Report From: Kristen Van Alphen, Manager of Legislative Services
Meeting Date: February 12, 2025
Report Code: CR-25-016
Subject: Project 4c2 – Agreement Development Toolkit

Recommendations:

THAT in consideration of Staff Report CR-25-016 respecting Project 4c2 – Agreement Development Toolkit, the Service Review Implementation Ad Hoc Committee recommends that City Council receive the report for information purposes.

Highlights:

- Staff are capitalizing on the Microsoft TEAMS platform by creating a TEAM specific to agreement development.
- The Agreement Development TEAM will include all managers; each will be able to create dedicated channels for collaboration on their agreements.
- The TEAMS platform will also contain resources to assist managers in agreement development and management.

Strategic Plan Alignment:

This report supports the delivery of Core Service.

Climate and Environmental Implications:

This supports the objectives of the City's Corporate Climate Change Adaptation Plan by considering climate adaptation in the development of the City's strategies, plans and policies.

Previous Report/Authority:

[Report CS-24-029 – Approval of Policy](#)

[Report CR-24-103 – Introduction to the Toolkit](#)

Background:

As part of the 2023 Service Review, Council approved 49 initiatives under six broad themes.

Two of the initiatives were found to overlap:

3b3 Develop a policy that would be applied in developing new partnerships and service delivery agreements or in renegotiations to ensure Council direction with respect to mandate and negotiation principles are applied.	4c2 Create 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
--	--

Rather than eliminate one of the initiatives, staff developed a policy to satisfy both actions and resolved to build a 'toolkit' of resources to assist staff in various elements of agreement development and management.

The cross-departmental team that is collaborating on this project consists of:

- Deputy Treasurer
- Events and Activation Coordinator
- Facilities Supervisor
- Information and Privacy Coordinator
- Manager of Corporate Services
- Manager of Legislative Services
- TTAG Assistant Curator
- Water and Wastewater Administrative Assistant

Analysis:

The toolkit is in the final stages of its initial development and will be launched following this report to the committee.

While the initial report anticipated using an online platform to host the toolkit, staff have determined that Microsoft TEAMS is the best platform for both collaboration and resource deployment.

Using the Microsoft TEAMS environment in this service review project also supports Service Review Project 1b1, which is intended to maximize opportunities to integrate Microsoft TEAMS throughout the corporation to coordinate project management, operations, and communications.

An Agreement Development TEAM is being created; the TEAM will include all managers, and each manager will have owner status. As owners, each manager will be able to create distinct channels within the TEAM for each agreement that they are leading through development. Additionally, a general channel will host all the resources being developed to assist the Agreement Lead and their collaborators.

The resources developed to date include Policy AF007 respecting agreement development, an annotated agreement template, a writing guide, an agreement development procedure, an agreement development checklist and a review/renewal checklist.

As mentioned in the last report, this project will, in some respects, never be finished. New resources can be added to the TEAM over time as managers' needs grow and change. The Manager of Legislative Services will take responsibility for updating the resources based on user feedback.

The various service review initiatives anticipate three outcomes: efficiency savings, dollar savings, and/or employee impact. The toolkit is anticipated to promote efficiency savings by standardizing the agreement development process and centralizing helpful resources. Dollar savings may also be achieved as the toolkit will support sound decision-making and a sound financial approach to new agreements and agreement updates.

Financial Implications:

There are no financial implications associated with this project beyond the staff time needed to develop the resource.

Communication Strategy:

All managers will receive a welcome email explaining the intent of the TEAMS platform before they are invited to the TEAM. Once on the platform, there will be a welcome message to orient the user and provide instructions on how to utilize channels for collaboration.

Consultation:

Project Team, Communications Advisor, Corporate Application Analyst

Attachments:

None.

Recommended by:

Kristen Van Alphen, Manager of Legislative Services

Kate Allan, Director of Corporate Services

Submission approved by:

Tim Simmonds, City Manager

For more information on this report, please contact Kristen Van Alphen at kvanalphen@owensound.ca or 519-376-4440 ext. 1228.