

## Report CAOR-CW-06-17

**To:** Warden Barfoot and Members of Grey County Council  
**From:** Kim Wingrove, Chief Administrative Officer  
**Meeting Date:** March 9, 2017  
**Subject:** **Envisio Initiative**  
**Status:** Recommendation adopted by Committee as presented per Resolution CW43-17; Endorsed by County Council March 23, 2017 per Resolution CC13-17;

### Recommendation(s)

**THAT County Council receive Report CAOR-CW-06-17 titled Envisio Initiative and approve the purchase of PMH Insights' Envisio Strategic Planning software at a cost of \$32,400, excluding HST, and that it be funded from the Strategic Plan Review Reserve.**

### Background

Presently, Grey County staff are actively engaged in the development and delivery of more than 110 different initiatives in support of the three strategic goals and priority outcomes in the County's 2016-2018 Strategic Plan. Tracking and coordinating this volume of work and ensuring everyone who needs the current status of projects has the information is challenging and time intensive. An assessment of the time and cost associated with the current manual process is included in the attached cost and activity tracking chart. The proposed project was initiated in order to improve coordination, timeliness of reporting and reduce administrative overhead.

This project will implement software that will support Council, staff and the public in deriving greater benefit at a reduced cost from our corporate planning and reporting activities.

Envisio is a cloud-based strategic plan, performance measurement and reporting software. It will help us make the most of our strategic plan and corporate operating plans by aligning and integrating the different work plans and initiatives automatically,

enabling staff to report on their own work in real time, supporting cross-functional collaboration, and aligning departmental operations with the County's strategic priorities. Reminders and reports are automated and all information will be available organization-wide. Grey County would have the ability to show the progress on initiatives via dashboards which could be visible to staff, Council and the public. All of this should support greater engagement with, and accountability for, the goals and objectives in the County's plans.

In order to gain the most benefit from the product this year, staff recommend utilizing the services of PMH Insights to provide a customized product specific to Grey County's use. PMH Insights will setup the strategic goals, initiatives and tasks in the software, create user IDs and rights, build report templates and train staff. The target go live date, if the project is approved, is April 2017.

## Financial / Staffing / Legal / Information Technology

### Considerations

The initial net costs to implement the software, set up the projects and users, and provide training to 30 staff is \$32,970 (net HST). These funds are available in the Strategic Plan Review Reserve. This reserve was established to fund Council and Departmental Strategic reviews. The projected balance in this reserve at December 31, 2016 is estimated to be \$244,833, with savings being incurred in 2016 with the completion of the current strategic plan update utilizing a minimal of external resources.

The 2018 budget would require \$7,325 (net HST) in funding to accommodate the annual Envisio license fee.

### Link to Strategic Goals / Priorities

This initiative contributes to Goal 3. Excellence in Governance and Service.

### Attachments

Cost and Activity Tracking

Respectfully submitted,

Kim Wingrove  
Chief Administrative Officer

## Cost and Activity Tracking Manual Process of Planning and Reporting

	Frequency	Frequency units	Business units/Users effected	Hours	Total hours	Total cost		Number of staff reporting	30
<b>Strategic Plan and Corporate Operating Plan</b>									
Building a Strategic Plan in word/excel - CAO and communications	Annual	1	1	2	20	40 \$	6,000.00	Number of business Units	13
Modify corporate operating	Quarterly	4	1	1	5	20 \$	1,000.00	CAO	1
Progress Updates	Monthly	12	30	2	720	36,000.00		Cost per hour for staff	\$ 50.00
Time spent chasing updates	Monthly	12	13	1	156	7,800.00		Cost per hour for CEO	\$ 150.00
Printing the plan	Annual	1	1	1	1	1 \$	150.00	FTE hours in a year	1650
Printing update Reports	Quarterly	4	11	1	44	44 \$	6,600.00		
							\$ 57,550.00		
<b>Departmental Business Plans</b>									
Create a business plan	Annual	1	13	15	195	195 \$	9,750.00		
Link it to the strategic plan	Annual	1	13	4	52	52 \$	2,600.00		
Progress Updates	Monthly	12	13	2	312	312 \$	15,600.00		
Time spent chasing updates	Monthly	12	13	1	156	156 \$	7,800.00		
Printing the plan	Annual	1	13	1	13	13 \$	650.00		
Modify business plan	Semi Annual	2	13	4	104	104 \$	5,200.00		
							\$ 41,600.00		
<b>Performance Evaluations</b>									
Build word template	Annual	1	1	4	4	4 \$	200.00		
Time preparing responses	Annual	1	30	2	60	60 \$	3,000.00		
Manual Filling	Annual	1	30	1	30	30 \$	1,500.00		
Time spent chasing individuals who didn't complete	Annual	1	30	1	30	30 \$	1,500.00		
							\$ 6,200.00		
<b>Serious pain points</b>									
Update the strategic plan - year over year	Annual	1	1	20	20	20 \$	1,000.00		
Change the strategic plan - supporting business plans need changing	Annual	1	13	4	52	52 \$	2,600.00		
Ad hoc custom report(s)	Quarterly	4	13	2	104	104 \$	5,200.00		
							\$ 8,800.00		
<b>Total costs</b>							<b>2113 \$ 114,150.00</b>		
							<b>Total Full time positions consumed on manual process</b>		<b>1.3</b>