

Organizational Excellence Specialists

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**The Organizational
Excellence Framework
in Action**

A Municipal Case Study

City of Chestermere - A Case Study

Chestermere, Alberta: In 2016, the City of Chestermere Corporate Services Department developed their departmental vision - *To become champions of organizational excellence and to do so by providing expertise and support in a collaborative and respectful environment.*

At some point the Corporate Services Director, Tracy Buteau reflected, “What is Organizational Excellence anyway?” So, in January 2017, the Corporate Services Department launched a series of Organizational Excellence Workshops in pursuit of gaining a better understanding of organizational excellence and what steps the Department needed to take to realize its vision.

Step 1 - Overview

Based on the Organizational Framework© (OEF), these monthly workshops were facilitated by, Tracey Polowich (Contigo Business Services Inc.), a Registered Organizational Excellence Specialist licensed to deliver programs on behalf of Organizational Excellence Specialists. The initiative was kicked off with an overview presentation to the functional leaders who were each assigned responsibility for co-leading one workshop in the series. This helped encourage leader buy-in to the initiative and demonstrated leader commitment to the rest of the staff.

The OEF is comprised of the principles and best management practices common to high

performing organizations. It is based on global models that have defined the principles and practices and been validated by over 25 years of research. The OEF is unique in that it consolidates the global models and shares implementation guidelines for the user.

Step 2 - Assessment

Each workshop introduced a different set of the key management areas (KMAs) of the Organizational Excellence Framework©, demonstrated the relevance of the best practices contained within the KMA and engaged the Corporate Services staff in assessment of the KMAs.

All employees got the opportunity to weigh in on rating the principles and

best management practices and providing open-ended comments all of which were provided confidentially and shared at the following workshop.

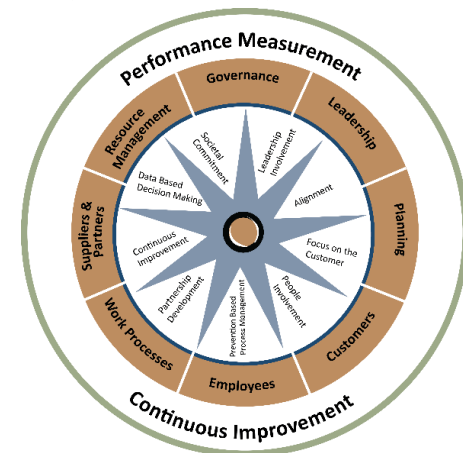
Prior to the final workshop, the lower rated practices were identified. Knowing this list was too large to tackle all at once, the functional leaders prioritized the practices by determining the influence they have on the Organizational Excellence Principles (culture of the organization), the City’s strategic priorities, and interrelationships with focus areas identified through a recent employee engagement survey.

Common to any new initiative, the greatest fear shared by staff is the work that may be added to their already-full plate. Therefore, this integration was important to gain the most

efficiency in effecting stronger improvement efforts with minimal added workload.

While quality experts know the secret behind the success of excellence models - implementation of best practices leads to higher organizational performance and

reduces, *not increases*, the effort each



employee must exert - convincing employees of this concept is challenging. They must *experience* the phenomenon first-hand.

Step 3 - Improvement and Action Planning

Working with only 9 practices divided into three categories - Resource Management, Communication and Information Sharing, and Focus on the (internal) Customer - all Corporate Services employees were assigned to a category team to work on brainstorming improvement ideas and developing an actionable plan for each selected idea.



“What is Organizational Excellence anyway?”

The interaction amongst the team members was invigorating and the ideas generated were *amazing!* Just a few of the ideas these teams came up with are:

Resource Management

- An Information Technology user survey to make best use of helpdesk resources
- Development of a process to evaluate lease vs. buy decisions to maximize capital expenditure resources

Communication and Information Sharing

- Candy-grams to encourage interest in important information distribution
- Revamp of the intranet (internal private network)
- Development of Administrative ‘Guiding Principle’
- Town Hall-type meetings for efficient communication of key messages

Focus on (internal) Customer

- Formalization of employee on-boarding processes
- A passport-type orientation to the Corporate Services functions with stamps provided for attendance at each information-sharing booth

What was *really* exciting to see was the collaboration of ideas that resulted - the group acknowledged that the Town Hall idea could be integrated with the Passport idea to create efficiency and pool resources.

The Corporate Services Department, and the City of Chestermere, in general, are no strangers to innovation and improvement. The

culture at the City seems to thrive on change. The difference introduced with the Organizational Excellence Framework© was *intention*. The improvement that the Department is striving for is intentional.



That is, improvements were aimed at increasing the performance of lower rated practices from the OEF assessment, keeping aligned with the City’s strategic priorities, and tackling the focus areas identified for enhancement through the employee survey.

Early Results

The shift in culture that occurs in organizations that pursue excellence helps expediate results. Employees feel empowered to improve how they perform their work and are beginning to consider new ideas and options.

As for the City’s specific improvement action plan, within six months of the workshops, the Information Technology user survey was conducted. The results of the survey have spurred improvement to the IT helpdesk ticket process increasing total per ticket response

times from an average of 110 hours in October 2017 to only 34 hours per ticket in March 2018.

Candy-grams delivered by key staff members have increased the effectiveness of message delivery. Though it may seem trivial, face-to-face contact is rare of late and leaders taking the time for this personal touch has really had an impact on morale.

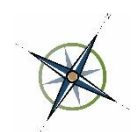
Town Hall meetings are well-attended by staff at all levels and prove to be a welcome forum for communication of organizational messages.

An employee survey was conducted to gather feedback on the usability and barriers to use of the intranet. Responses indicated avoidance due to cumbersome access, infrequent visits and lack of useful information being available. The re-design has focussed on creating a one-stop portal for staff, where all resources (ie: forms/templates, phone instructions, policies, training resources, survey results) are housed, forcing employees to access the portal more frequently.

This improvement saves time - both for staff in searching for resources, knowing the one place they need to look and in updating of resources as there is only one location these resources need to be revised.

**We serve our community by
creating an amazing place to
live, work and play -
Administrative Guiding Principle**

In anticipation of the uncertainty that comes with a newly-elected council, the Corporate Leadership Team led the development of an administrative ‘Guiding Principle’. Keeping with



the intent of the organization’s vision, mission and values, this ‘Guiding Principle’ is intended to help guide staff and maintain consistency in service delivery through the changes in governing leadership.

Responding to the call for better support for new employees, the Human Resources (HR) department has developed more formal on-boarding and off-boarding processes. With HR serving as a recruiting partner, a comprehensive, supported and consistent process is followed throughout the organization to ensure each employee is provided with the best opportunity to succeed. An exit interview, knowledge transfer process and security protocol conducted upon termination of an employee help the organization to close gaps in service provision and protect the City’s integrity. All efforts are expected to contribute to happier, more productive employees and a lower turnover rate.

Accounts Payable processing time has been reduced by encouraging vendors to sign up for electronic funds transfer. There was an increase of 9% in vendors paid through EFT as opposed to payments issued by cheque from 2016 to 2017. The elimination of 243 cheques to process has saved an estimated \$700 worth of time per year. This may not seem significant but with 134 FTEs, just one of these small initiatives per employee can produce quite an impact overall.

Future improvements planned

The tax department is planning to eliminate the printing and filing of hard copies of tax certificates which will save approximately \$3,500 in staff time and a reduction of 1,466 sheets of paper on average annually.

“I found the final improvement planning workshop very beneficial and eye-opening. The results we have experienced in just a short time are dramatic! I feel there’s always room for more improvement as long as we empower employees to take action.”

Chestermere Employee

The IT department plans to continue making improvements to their helpdesk service through further refinement of ticket categorization and tracking processes.

HR intends to rotate the HR Advisor office through various organizational locations to broaden their accessibility and allow first-hand observation of each unique group’s needs.

Success factors

One advantage of using the Organizational Excellence Framework © is the flexibility in options for implementation. For the City of

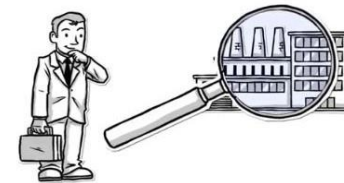
Chestermere Corporate Services Department, spreading the assessment workshops over several months was best-suited for their needs.

The following factors were also important to the success of the project:

- Leader involvement and commitment
- Split assessments over 6 months (1.5-hour sessions each)
- Report previous results at each meeting
- Report on Global Assessment Results for comparison
- Encourage discussion and sharing

The Organizational Excellence Framework© (OEF) toolkit has been designed to support the excellence journey of any size or type of organization and this case study proves its value in government entities. Lending support to the strategic imperatives of the organization, the toolkit transfers knowledge to employees and involves the entire team in moving the organization from current state to desired future state.

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Use the OEF [toolkit](#) in your municipality

