

CAO-2024-166

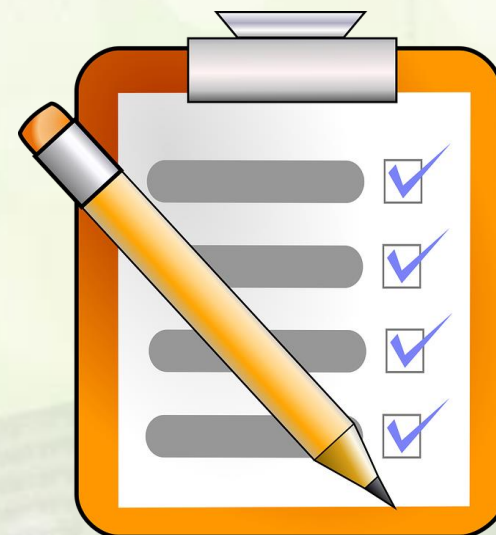
2ND QUARTER AUDIT STATUS REPORT

Summary



Completed:

- ✓ External billable workorders – Lean review
- ✓ Parking & mileage – status report
- ✓ Underground locates – status report
- ✓ Technology field inventory – status report



EXTERNAL BILLABLE WORKORDERS

Definition

- External Billable Workorder =
 - Work performed by City staff that is billable to an external customer
- Examples:
 - Sewer blockages
 - Gas or watermain hits
 - Road closures



Lean Review Objectives



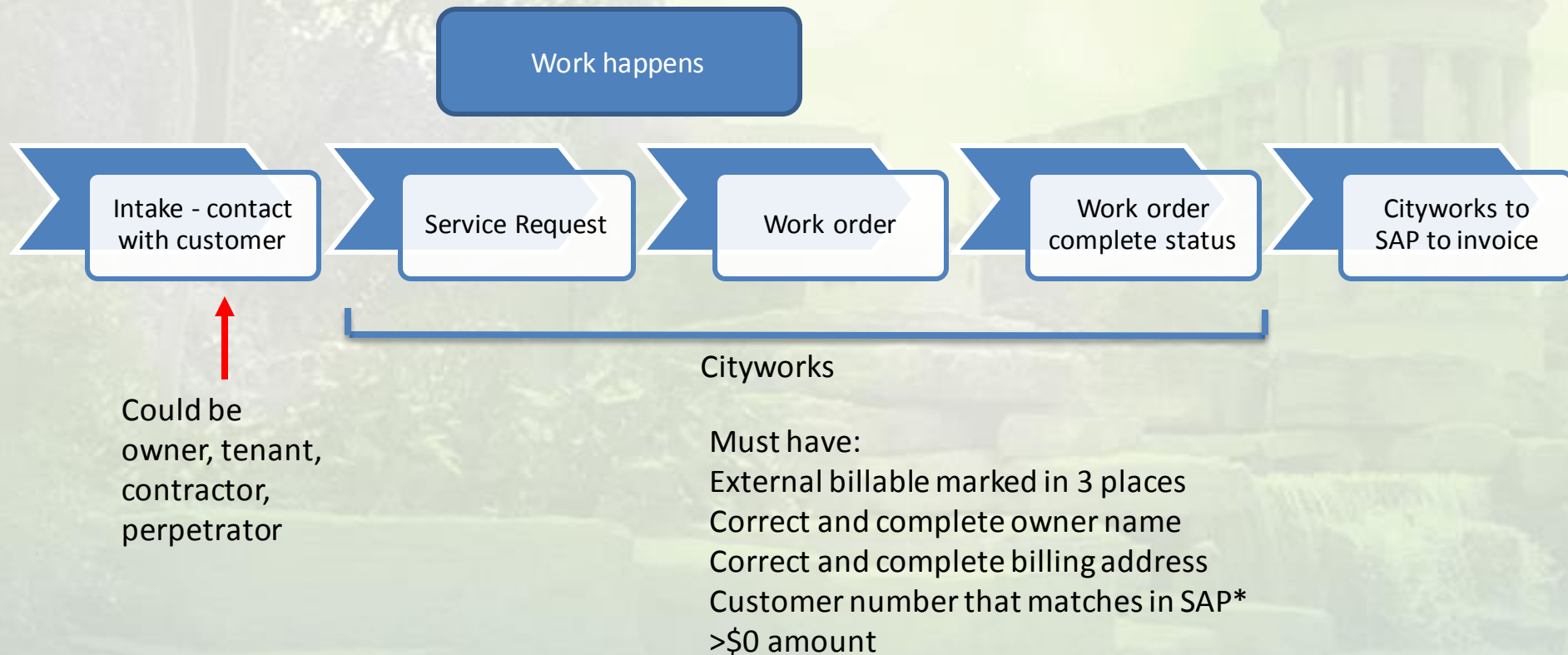
- To examine the external billable workorder intake process to find the most efficient, effective and accurate method to facilitate billing the customer
- **Scope:** from service request to work order completion

Methodology

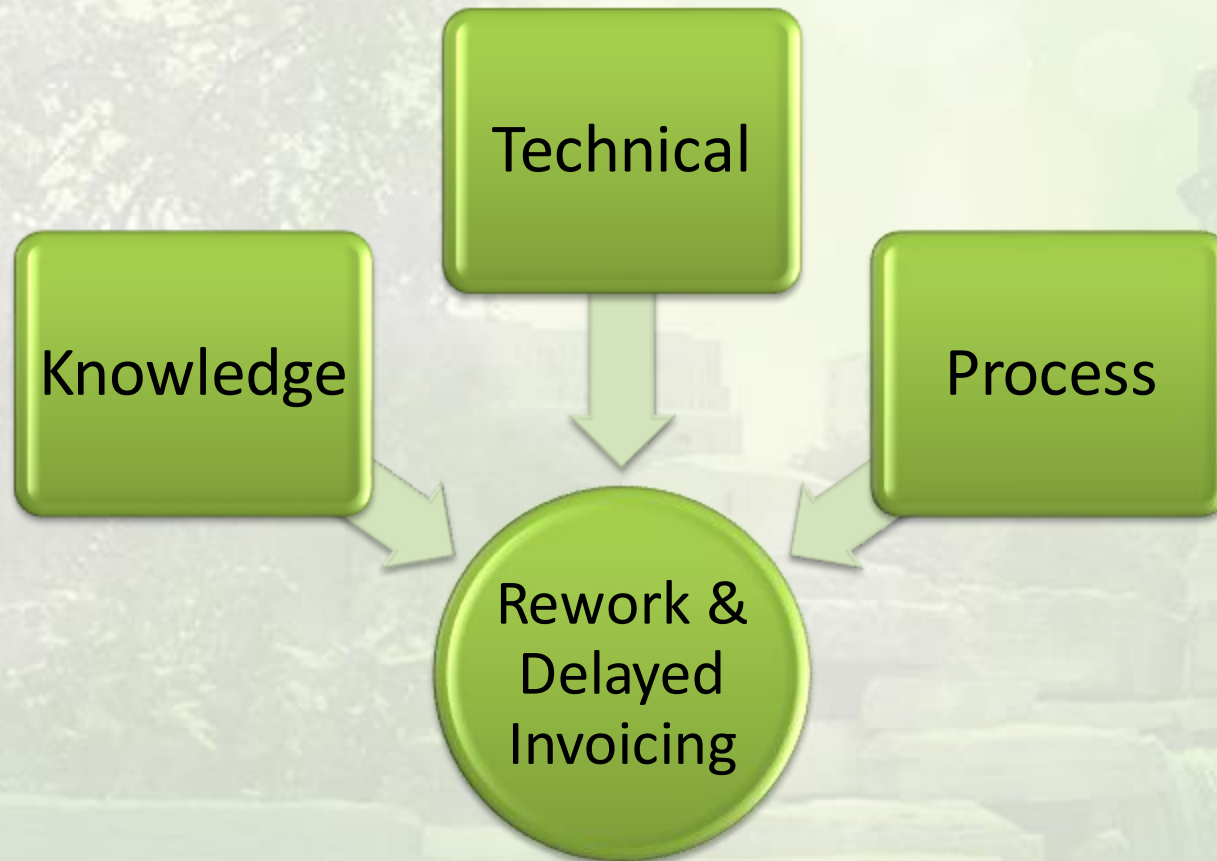


- Internal stakeholder interviews
- Document review
- Data collection
- Current state process mapping
- Problem identification and root cause analysis
- Solution generation
- Implementation planning and Kaizen event
- Project close-out and lessons learned

Current Macro Process



Problems



Solutions



- Roles & responsibilities
- Business rules for when to bill
- Staff training
- Single billing screen with contact field
- System changes (interim & flat fee billing, billable by default)

Future State Goals

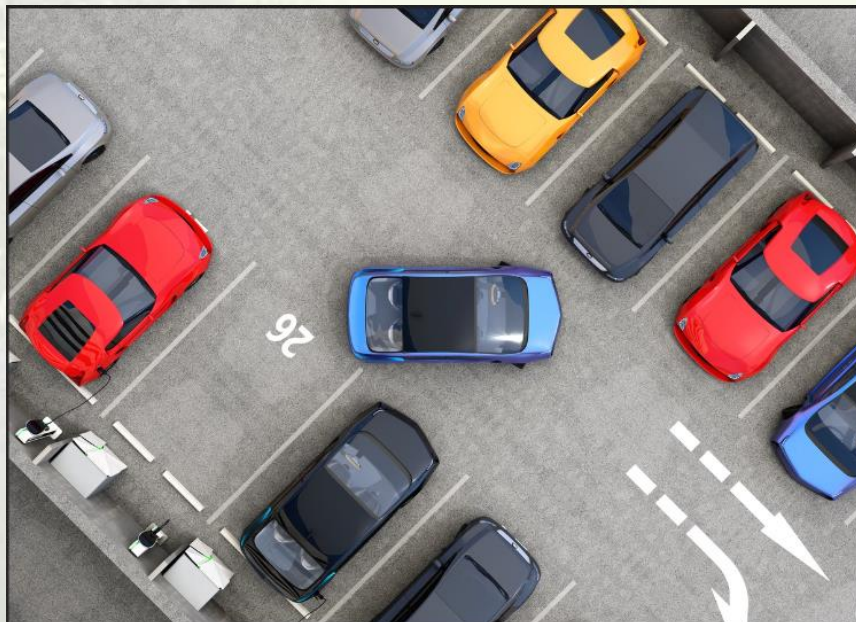


- Less rework for Revenue and Support Services staff
- Billing info collected at first point of contact
- Roles and responsibilities communicated
- All billing info accessible on one screen
- More accurate and timely billing
- No lost revenue

Accountability



- Action items assigned
- Status updates at 1,3,6, and 12 month marks
- Formal status report to Audit Committee at 12 months



PARKING & MILEAGE EXPENSES

Parking & Mileage Expenses

Status Update Objective:

To hold staff accountable for addressing audit findings and identify areas without significant progress.

Original Audit Objective:

To test compliance with parking and mileage reimbursement policies.

Status of Recommendations



Status	Number of Recommendations
Total recommendations	3
Complete	1
In progress	0
Not started	0
Not required	2

- Paid parking for all staff implemented Jan.1, 2024

Mileage will remain on rotating list of compliance audits.



UNDERGROUND LOCATES

Underground Locates



Status Update Objective:

To hold staff accountable for addressing audit findings and identify areas without significant progress.

Original Audit Objective:

To identify compliance risks of Bill 93 and mitigate them.

Status of Recommendations



Status	Number of Recommendations
Total recommendations	24
Complete	10
In progress	5
Not started	4
Not required	1

- 2 vacant positions yet to fill
- Utilizing locate software and staff training for 2024 season

Compliance will be monitored throughout season.



TECHNOLOGY FIELD ASSETS

Technology Field Assets



Status Update Objective:

To hold staff accountable for addressing audit findings and identify areas without significant progress.

Original Audit Objective:

To count all field hardware assets and compare to asset database



Status of Recommendations

Status	Number of Recommendations
Total recommendations	5
Complete	1
In progress	2
Not started	2
Not required	0

- Implementing asset management module to track assets

Full physical inventory in 2028 by Internal Audit