



## **Annual Report 2021: Service Excellence**

**To:** Planning and Priorities Committee

**Date:** 3 November, 2021

**Report No.:** 11-21-4174

### **Strategic Directions**

- Allocate Human and Financial Resources Strategically to Support Student Needs
- Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being
- Create a Culture for Student and Staff Well-Being
- Provide Equity of Access to Learning Opportunities for All Students

### **Recommendation**

It is recommended that the Director establish the following achievement targets for all central business teams participating in the Service Excellence program:

- 2021-22 (cycle 4): Level 1
- 2022-23 (cycle 5): Level 2
- 2023-24 (cycle 6): Level 3

### **Context**

Between the 2018-19 and 2020-21 school years, sixty-seven central business teams participated in the TDSB's service excellence program. These teams represent fourteen departments, including Business Services, Employee Services, Facility Services and Planning, and Information Technology Services (see Appendix A for a complete list of 2020-21 teams by department).

During its May 2020 meeting, the Board of Trustees received the first annual TDSB Service Excellence report. That report highlighted the efforts of these central business teams in demonstrating the TDSB's [Vision for Service](#), including how teams are assessed and certified each year.

Since the last report to Board, these central business teams have continued to conduct service improvements and adopt business best practices focused on delivering high-quality services to students, schools, staff, and communities. However, how teams have engaged in Service Excellence has significantly varied due to the impacts of COVID-19.

This report will share the 2020-21 Service Excellence results, an overview of the impact of COVID-19, including the need to reset the achievement targets, and how improvements are being made to the program to help strengthen the engagement of all central business teams.

### **2020-21 Service Excellence Results**

The original certification target for 2020-21 (cycle 3) was for all teams to achieve a minimum of level 2 (Implementer) certification. This certification target changed to "***all teams must complete the cycle***" to acknowledge the challenges that teams had continuing their engagement in the program during COVID-19. Teams had the choice of certifying or attending a check-in meeting. Certified teams provided evidence for review and achieved a certification level (see Appendix B for a description of certification levels). Check-in teams participated in a coaching meeting but did not receive a certification level.

The 2020-21 (cycle 3) certification highlights include:

- 31 teams achieving certification; and
- 34% of teams demonstrating best practices at level 3 (Specialist).

For a detailed list of 2020-21 (cycle 3) Certification Results by Department, see Appendix C.

Data collected during cycle three also gives meaningful insights on the impact of Service Excellence. Teams across central business departments have made progress in building a culture focused on meeting the needs of clients (e.g., students, schools, staff, and communities) and supporting staff. Strong practices demonstrated by the 31 certified teams include:

- 81% of teams implementing an improvement that increased the accessibility of their services or workplace
- 81% of teams using tools to track and analyze client needs
- 90% of teams seeking feedback on client satisfaction to improve services
- 87% of teams recognizing significant work milestones
- 61% of teams gathering staff feedback on team climate and staff well-being

See Appendix D for additional insights on the impacts of Service Excellence.

For the twenty-three teams who achieved level 3 (Specialist), a common success factor was positive and inclusive leadership from management. These managers emphasize continuous recognition of individual and team efforts, foster shared leadership, and model service excellence practices. Three level 3 teams have shared their service excellence stories in Appendix E. These stories give concrete examples of how positive and inclusive managers work collaboratively with their teams to embed service excellence into the way they work.

Staff engagement has also been very positive in cycle 3, with 86% of all staff indicating they would recommend the Service Excellence program to other staff. See Appendix F for quotes from participating staff, highlighting what staff have found meaningful about the program.

### **COVID-19 Impact**

While the certification results for 2020-21 (cycle 3) highlight how teams are committed to continuous improvement and engagement in Service Excellence, COVID-19 has significantly impacted what engagement looks like. As a result of the pandemic, the cycle two target (2019-20) of all teams achieving level 1 (Explorer) and cycle three target (2020-21) of all teams achieving level 2 (Implementer) had to be modified. Instead of the original targets, teams could put their annual assessment and certification on hold by opting for a check-in. During both cycles, approximately 50% of teams opted for a check-in.

As staff adapt to services during COVID-19, it is essential to reset the achievement targets to re-engage all teams and establish consistent best practices across central business departments. To support teams in transitioning to deeper engagement, the following targets will be set:

- 2021-22 (cycle 4): All teams achieve level 1 (a reset to the original target before the pandemic)
- 2022-23 (cycle 5): All teams achieve level 2
- 2023-24 (cycle 6): All teams achieve level 3

Setting these targets will give teams a clear understanding of expectations and will support central business departments in deepening their demonstration of service excellence best practices.

### **Looking Ahead: Changes to Service Excellence Program**

To support teams in meeting these new targets and in response to team feedback over the past three years, the Service Excellence team is implementing several changes this cycle, including:

- An online Service Improvement Planner tool that simplifies teams' improvement planning and deepens understanding of expectations and best practices;
- A real-time dashboard for each team that shows their service improvement activity and achievements in one place;
- On-demand online assessment of team service improvements;
- Streamlining and reduction of the evidence required to certify;
- Increased business coaching from the Service Excellence team to guide teams in adopting the changes;
- Increased strategic consulting to department leadership, projects, and committees to ensure the application of a service excellence lens to system-level initiatives.

## **Action Plan and Associated Timeline**

The new achievement targets will take effect upon approval of this report.

## **Resource Implications**

Program resources are managed in the current departmental budget.

## **Communications Considerations**

N/A

## **Board Policy and Procedure Reference(s)**

[TDSB Vision for Service](#)

## **Appendices**

- Appendix A: List of Teams Engaged in Service Excellence by Department
- Appendix B: Certification Levels Description
- Appendix C: 2021 (cycle 3) Certification Results by Department
- Appendix D: Service Excellence Impacts 2021 (cycle 3)
- Appendix E: Team Stories Highlighting Positive, Inclusive Leadership
- Appendix F: Staff Quotes on the Impact of Service Excellence

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## **Appendix A: List of Teams Engaged in Service Excellence by Department**

The following list represents the structure of the fourteen central business departments and sixty-seven teams engaged in Service Excellence during 2020-2021 (cycle 3).

### **Departments with Multiple Teams**

#### **Department: Business Services**

##### **Teams:**

- |  |   |                               |
|--|---|-------------------------------|
| 1. Accounts Payable                      | 5. Compensation Services  | 9. Insurance & Risk           |
| 2. Budget, Revenue & Financial Reporting | 6. Distribution Centre & Printing, Mailroom, Courier, & Logistics | 10. Internal Audit Management |
| 3. Business Development                  | 7. Finance Support  | 11. Nutrition Services        |
| 4. Community Services                    | 8. General Accounting   | 12. Purchasing Services       |
|  |   | 13. Student Transportation    |

#### **Department: Employee Services**

##### **Teams:**

- |                               |  |   |
|-------------------------------|--|---|
| 1. Disability Case Management | 6. Police Record Check Office                | 10. Support Staff Recruitment   |
| 2. Elementary Teaching Office | 7. Secondary Teaching Office                 | 11. Support Staff Unit C Central/ Schedule II/ Administration/ Employee Relations |
| 3. Investigations             | 8. Staffing - Support Staff - Unit C Schools | 12. Units A, B & GI   |
| 4. Labour Relations           | 9. Staffing Information Systems              | 13. Units D & E   |
| 5. Organizational Management  |  |   |

#### **Department: Facility Services and Planning**

##### **Teams:**

- |                               |                                   |                                |
|-------------------------------|-----------------------------------|--------------------------------|
| 1. Capital Project Management | 5. Design and Renewal             | 9. Permits                     |
| 2. Central Services           | 6. Facility Services Admin        | 10. Plant Operations           |
| 3. Construction - In House    | 7. Maintenance                    | 11. Security Operations Centre |
| 4. Construction Data Systems  | 8. Occupational Health and Safety | 12. Strategy and Planning      |
|                               |                                   | 13. Sustainability             |

**Department:** Government, Public and Community Relations

**Teams:**

- |                   |   |
|-------------------|---|
| 1. Communications | 2. Digital<br>Communications<br>and Marketing |
|-------------------|---|

**Department:** Information Technology Services

**Teams:**

- |  |                                   |                                    |
|--|-----------------------------------|------------------------------------|
| 1. App Admin Team                        | 8. Field Services                 | 13. Privacy Office                 |
| 2. Business Analytics                    | 9. IT Portfolio                   | 14. SAP Application<br>Development |
| 3. Business Process                      | Management and                    | 15. SAP A-Xcellence                |
| 4. Central Transcript<br>Office          | Communications                    | 16. SAP Basis and<br>Security      |
| 5. Client Relations                      | 10. ITS Enterprise Data           | 17. School Information<br>Systems  |
| 6. Client Services Desk                  | 11. ITS Operations                |                                    |
| 7. Cyber Security and<br>Risk Management | 12. Mobile and Web<br>Development |                                    |

**Departments with a Single Team:**

1. Board Services
2. Continuing Education
3. Educational Partnerships
4. Executive Assistants
5. International Students and Admissions Office
6. Legal Services
7. Policy Services
8. Research and Development
9. Trustee Shared Services

## Appendix B: Certification Levels Description

Certification Level	What does this level look like?
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### Level 1 – Explorer

*25 to 49 points*

The team has begun to discuss Service Excellence in team meetings and is getting a Service Improvement Team (SIT) in place. In addition, there is basic documentation of a few business practices.



### Level 2 – Implementer

*50 to 74 points*

Practices and improvements are becoming established. The SIT is meeting regularly over the cycle and has committed to implementing one or two service improvements. Started basic planning practices and attention to improving in a few focus areas.



### Level 3 – Specialist

*75 to 88 points*

Practices and improvements are consistent and demonstrate complexity in how client services are assessed and delivered. The SIT and team are regularly collaborating on service improvements. Tools and templates are regularly utilized, and client and staff feedback is gathered and analyzed to improve continuously across multiple focus areas.



### Level 4 – Expert

*89 to 100 points*

Practices and improvements are advanced and demonstrate best practices sustained for at least two years (at level three) across all five focus areas. The SIT and team work collaboratively to plan and implement complex service improvements. Client and staff feedback indicate high levels of satisfaction, and insights are regularly captured and analyzed to drive improvements. The team has also learned and demonstrated coaching capabilities to strengthen other teams to deliver Service Excellence.

## Appendix C: 2020-21 (Cycle 3) Certification Results by Department

Each department is listed in the following tables to outline certification score results, check-in status and teams who didn't participate in certification (did not complete cycle).

This appendix also provides a comparative look at team scores over the past three cycles. The change in scores between the current and previous cycles (if applicable) indicates team progress over time.

### Board Services

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Board Services	61.46	Did not complete cycle	Did not complete cycle	N/A	N/A

### Business Services

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Accounts Payable	48.13	Check-in	Check-in	N/A	N/A
Budget, Revenue & Financial Reporting	51.88	75.94	Check-in	N/A	N/A
Business Development	72.50	91.25	97.81 <sup>1</sup>	Level 3	6.56
Community Services	56.67	76.25	90.00 <sup>1</sup>	Level 3	13.75
Compensation Services	56.88	Check-in	71.56	Level 2	14.68
Distribution Centre & Printing, Mailroom, Courier, & Logistics	Did not complete cycle	Check-in	Check-in	N/A	N/A
Finance Support	50.83	60.94	81.25	Level 3	20.31
General Accounting	34.17	58.44	78.44	Level 3	20.00

<sup>1</sup> To achieve Expert level certification, teams need to meet additional requirements, including two years at level 3.



Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Insurance & Risk	N/A - New Team	Check-in	40.94	Level 1	N/A
Internal Audit Management	N/A - New Team	44.06	Check-in	N/A	N/A
Nutrition Services	Did not complete	42.50	58.75	Level 2	16.25
Purchasing Services	40.42	53.44	75.63	Level 3	22.19
Student Transportation	Did not complete	48.13	Check-in	N/A	N/A

#### Continuing Education

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Continuing Education	Did not complete	43.75	71.56	Level 2	27.81

#### Educational Partnerships

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Educational Partnerships	52.08	76.88	Did not complete cycle	N/A	N/A

## Employee Services

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Disability Case Management	51.67	63.75	70.31	Level 2	6.56
Elementary Teaching Office	29.38	52.50	85.94	Level 3	33.44
Investigations	33.54	Did not complete cycle	Did not complete cycle	N/A	N/A
Labour Relations	56.25	Check-in	85.31	Level 3	29.06
Organizational Management	70.63	Check-in	Check-in	N/A	N/A
Police Record Check Office	42.50	Did not complete cycle	Did not complete cycle	N/A	N/A
Secondary Teaching Office	51.04	Check-in	Check-in	N/A	N/A
Staffing - Support Staff - Unit C Schools	39.58	58.13	83.13	Level 3	25.00
Staffing Information Systems	15.21	Did not complete cycle	Did not complete cycle	N/A	N/A
Support Staff Recruitment	39.58	Check-in	Check-in	N/A	N/A
Support Staff Unit C Central/ Schedule II/ Administration/ Employee Relations	Did not complete	Check-in	63.13	Level 2	N/A
Units A, B & GI	28.13	Check-in	59.38	Level 2	31.25
Units D & E	77.29	Check-in	88.13 <sup>2</sup>	Level 3	10.84

<sup>2</sup> To achieve Expert level certification, teams need to meet additional requirements, including two years at level 3.

**Executive Assistants**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Executive Assistants	N/A - New Team	Did not complete cycle	Did not complete cycle	N/A	N/A

**Facility Services and Planning**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Capital Project Management	68.75	75.31	Check-in	N/A	N/A
Central Services	17.92	41.56	Check-in	N/A	N/A
Construction - In House	50.63	Check-in	Check-in	N/A	N/A
Construction Data Systems	59.38	Check-in	Check-in	N/A	N/A
Design and Renewal	34.38	Check-in	Check-in	N/A	N/A
Facility Services Admin	35.21	Check-in	Check-in	N/A	N/A
Maintenance	40.00	Check-in	Check-in	N/A	N/A
Occupational Health	37.92	Check-in	67.19	Level 2	29.27
Permits	54.38	Check-in	84.38	Level 3	30.00
Plant Operations	43.54	Check-in	Check-in	N/A	N/A
Security Operations Centre	26.67	Check-in	Did not complete cycle	N/A	N/A

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Strategy and Planning	64.93	81.04	93.75 <sup>3</sup>	Level 3	12.71
Sustainability	70.42	76.56	89.06 <sup>3</sup>	Level 3	12.50

#### Government, Public and Community Relations

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Communications	19.79	Check-in	Check-in	N/A	N/A
Digital Communications and Marketing	50.83	Check-in	Check-in	N/A	N/A

#### Information Technology Services

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
App Admin Team	55.00	75.00	95.31 <sup>3</sup>	Level 3	20.31
Business Analytics	62.71	Check-in	Did not complete cycle	N/A	N/A
Business Process	73.13	Check-in	Check-in	N/A	N/A
Central Transcript Office	58.54	70.00	89.69 <sup>3</sup>	Level 3	19.69
Client Relations	33.13	Check-in	Check-in	N/A	N/A

<sup>3</sup> To achieve Expert level certification, teams need to meet additional requirements, including two years at level 3.

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Client Services Desk	82.71	Check-in	92.50 <sup>4</sup>	Level 3	9.79
Cyber Security and Risk Management	40.21	75.63	79.38	Level 3	3.75
Field Services	3.33	64.06	Check-in	N/A	N/A
IT Portfolio Management and Communications	62.08	81.25	95.31 <sup>4</sup>	Level 3	14.06
ITS Enterprise Data	47.50	76.25	100.00 <sup>4</sup>	Level 3	23.75
ITS Operations	39.38	55.00	Check-in	N/A	N/A
Mobile and Web Development	69.17	Check-in	95.00 <sup>4</sup>	Level 3	25.83
Privacy Office	0.00	Check-in	Did not complete cycle	N/A	N/A
SAP Application Development	36.04	80.00	95.31 <sup>4</sup>	Level 3	15.31
SAP A-Xcellence	54.38	70.94	89.69 <sup>4</sup>	Level 3	18.75
SAP Basis and Security	36.04	85.00	100.00 <sup>4</sup>	Level 3	15.00
School Information Systems	63.13	Check-in	Did not complete cycle	N/A	N/A

#### International Students Admission Office

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
International Students Admission Office	N/A - New Team	Check-in	Check-in	N/A	N/A

<sup>4</sup> To achieve Expert level certification, teams need to meet additional requirements, including two years at level 3.

## Legal Services

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Legal Services	58.54	Check-in	Check-in	N/A	N/A

## Policy Services

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Policy Services	61.25	Check-in	Check-in	N/A	N/A

## Research and Development

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Research and Development	29.17	77.19	Check-in	N/A	N/A

## Trustee Shared Services

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Trustee Shared Services	72.71	Check-in	81.25	Level 3	8.54

## Appendix D 2020-21 (Cycle 3) Service Excellence Impacts

The following data reflects practices of the 31 certifying teams from cycle three.

### Establishing Equity as the Foundation:

81%

of teams implemented a Service Improvement focused on increasing the accessibility of their services or workplace

90%

of teams are seeking feedback on client satisfaction to improve services

81%

of teams are using tools to track and analyze client issues

### Fostering Leadership and Teamwork:

94%

of teams are meeting regularly to plan and implement improvements

48%

of teams have gathered team feedback on management support

### Strengthening Service Delivery:

74%

of teams create detailed project plans when implementing complex improvements

84%

of teams implemented improvements across their core services

84%

of teams are gathering client feedback on responsiveness

### **Celebrating Service Excellence:**

**220**

RASE submissions this year (503 RASE submissions to date)

**87%**

of teams are recognizing significant work milestones

### **Developing Leadership Capacity:**

**61%**

of teams are gathering staff feedback on team climate

**32%**

of teams are gathering staff feedback on learning goals

**29%**

of teams have learning plans for each team member



## Appendix E: Team Stories Highlighting Positive Inclusive Leadership

The following stories from level 3 teams highlight inclusive leadership's essential role in building a service excellence culture.

### Recognize Individual and Team Efforts: Business Development



Business Development provides resources and advisory support to TDSB schools, staff and communities on donations, fundraising, and the distribution of materials. Actions management has taken to integrate recognition into the way they work include:

- Adding staff recognition as an item in weekly team meetings.
- Regularly sharing team successes with senior and executive management to profile the team's work.
- Submitting eight Random Acts of Service Excellence (RASE) nominations to recognize staff work in central departments.
- Creating opportunities for staff to see the direct impact of their work by giving staff time to participate in activities related to their team's work (e.g., vendor visits, school celebration events).

## Focus on People Excellence: Client Service Desk



The Client Services Desk team, with 35 staff, provides IT call centre support to staff and students across the TDSB. Over the past four years, the management team has worked with their staff to create a positive work culture with engaged staff. Actions management has taken to prioritize people excellence include:

- Consistently collecting staff feedback and following up on it shows staff that their ideas are valued and their voice is essential.
- Emphasizing the importance of learning and collaboration with designated time during March Break and the Summer for strategic planning and professional development.
- Building fun into the work to relieve some of the stress of providing a front-line service - as seen in the picture above.

## Modeling Service Excellence: Strategy & Planning



Strategy and Planning is a Facility Services and Planning team with 25 staff members who provide comprehensive planning data, analysis and plans to internal and external clients. Practices the management team have implemented to model Service Excellence with team members include:

- Conducting a Team Fitness Survey. Outcomes included a commitment to Actions and Ground Rules documents.
- Implementing a client feedback survey in the email signature of all staff members. Management regularly reviews the feedback and shares monthly updates with the broader team.
- Surveying staff across the unit to understand their professional development goals and how they could support these goals.



## Appendix F: Staff Quotes on the Impact of Service Excellence

The following quotes come directly from central business staff through our 2021 (cycle 3) year-end survey.

