



Digital Strategy

Executive Summary

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1.0 Introduction

Perry Group Consulting (PGC) is a firm that specializes in technology in municipalities. Our mission is *building better municipalities* and we have worked with over 150 municipalities across Canada on technology strategy and planning work, business process optimization and solutions implementation.

Perry Group was hired by the County of Renfrew (the “County”), to assist in the development of a Digital Strategy. The project, which began in September 2021, was sponsored by the County’s Director of Corporate Services and the Manager of IT and was supported by the Senior Leadership Team (SLT).

1.1 Background

This project was identified in the Corporate Strategic Plan 2019 – 2022 as a major priority. The goal of the Technology Acceleration priority in the CSP states:

“Position the County of Renfrew so that resident’s benefit from advances in technology, and to ensure residents and staff have fair, affordable, and reasonable access to technology.”

The development of an IT Roadmap was also identified in the Service Delivery Review, completed in 2020. This review further identified the need for the digitization of several processes which have been included in this plan.

The first phase of the project was an assessment of the current state of technology. The Current State Report provided the opportunity for senior leadership and Council to set a new direction for how technology is managed at the County. This new direction forms the basis for this Digital Strategy and helps to set the foundation for the roadmap moving forward.

The Final Report provides details on the opportunities, the prioritization processes, and an understanding of the expected benefits of the Digital Strategy. This Executive Summary highlights the overall project with specific focus on the changes required and the roadmap for the next 4-5 years.

It is undeniable that, over the last decade and a half, the world has become increasingly digital and this past two years has only accelerated this growth. In response to the pandemic shutdowns and work from home protocols, there have been disruptive changes to all business models forcing many to embrace technology to simply maintain operations as businesses were forced to close their physical locations.

Technology was shifted into being a critical function and IT departments were no longer a supporting back-office service, but they became essential to new service delivery methods. The County of Renfrew, like so many other municipalities, faced unprecedented similar challenges when the pandemic hit, resulting in needed changes to service delivery and interactions with residents, businesses and the local municipalities.

1.2 The Importance of this Digital Strategy

Technology has become critical to the County's ability to deliver services as diverse as managing finances, maintaining critical infrastructure, managing community housing and delivering emergency services. All of these services today rely on technology to operate effectively and efficiently and would be significantly more costly to deliver without technology.

In each case, without technology, the customer experience would be significantly poorer with long line-ups at customer service counters, limited-service options with customers needing to come to a municipal facility during working hours to make a payment or register. What's more, each of these services would require more staff to process bills and handle requests as well as to serve customers at the counter.

The diagram below is an illustration of how the crux of common systems feeds a multitude of areas – internal and external to the County – such as back-office staff, customer service agents, field staff, Council and management as well as online customers, face-to-face customers, phone customers and app/social media customers.

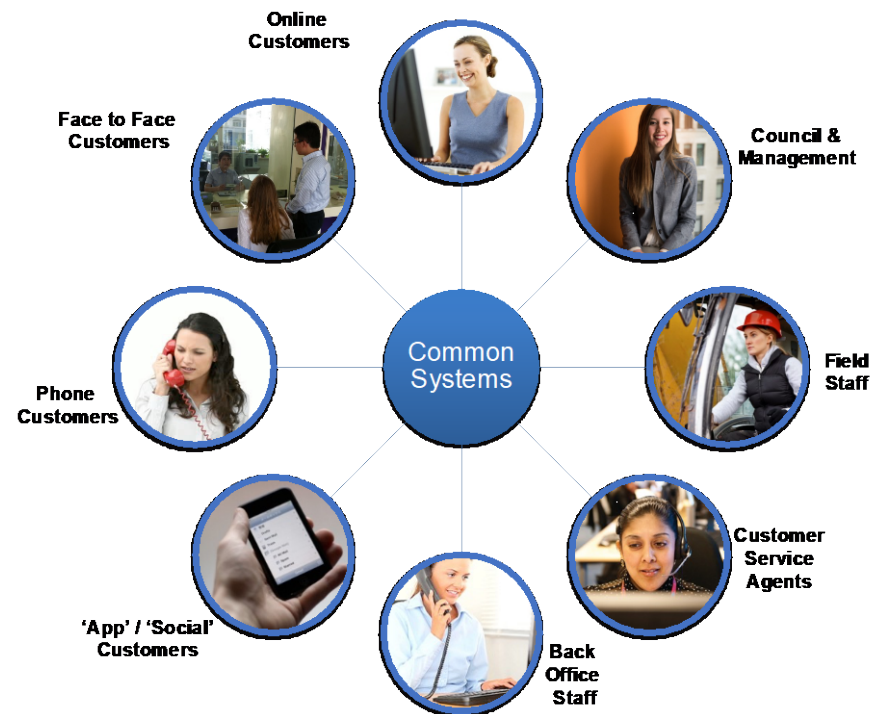


Figure 1: Common Systems

During the pandemic, the use of and demand for online services has surged. This has become an opportunity for the County, and the right time to introduce more digital and modern service delivery to its staff and residents.

By putting the correct foundations in place, the County will be in a better position to save valuable time and money as well as improve the overall service delivery model. Implementing online services and encouraging their adoption is an important way for the County to reduce staff time processing requests and overall transaction costs.

Given the importance of technology and its role in delivering County services – and particularly given the many competing demands of the municipal setting – a Digital Strategy is crucial. It should address questions that are fundamental to the County's future success, such as:

- Are we doing the right things with technology and digital?
- Are we making the right technology and digital investments?
- Is our information technology environment properly managed, maintained, secured and able to support the clients?
- Is it cost-effective?
- What are our future business needs?
- Is our technology environment equipped to meet current and future business needs?

Technology should provide leadership with the information it needs to support evidence-based decisions – helping to identify optimizations that drive service costs down (with improved efficiencies and reduced redundancies) and support cost avoidances. It should give the Council insights, performance indicators and long-term projections it needs to provide effective oversight to the administration.

Data and information are expected to become increasingly more important, providing insights about service delivery that allow County officials to improve efficiency and improve services. Predictive analytics will likely help municipalities work smarter and more efficiently.

Critically, a Digital Strategy allows the County to determine its strategic technology priorities and then set out the initiatives and activities that will be critical to supporting the County's strategic business goals and objectives, and what supports will be needed to deliver on the priorities.

2.0 Current State and Challenges

To determine how to move forward, it was important to have a good understanding of the current state of digital and technological capability at the County. This Discovery phase provided the forum to identify successes and strengths as well as gaps and opportunities.

The Consulting team conducted detailed assessments of the current technology and digital environments and an assessment of the overall systems management procedures. Findings were then compiled and shared and validated with the County's IT Team and Senior Leadership.

Interviews were conducted with every department, with management and with several of the local municipal mayors and CAO's. Also, a workshop was conducted with County Council to gain an understanding of their goals and desired outcomes. A survey was conducted among all staff to give everyone the opportunity to share their opinions. Over 170 staff responded representing every department.

Perry Group's standardized Municipal Technology Model (MTM) was the basis for evaluating the County's technology architecture environment. The model has four interconnected layers. Each entity noted within a layer relies on the other layers for staff to deliver services to internal and external clients. Details of the assessments were provided to SLT and staff for review and discussion.

As part of the assessment, how the organization approaches information, technology, and digital management was considered.

While there are various positives – including a capable team in IT, a strong and stable network with appropriate security protocols in place, some important issues were identified and are discussed here.

2.1 IT Operating Model

The County's IT operating model (how technology is designed, delivered, and managed) has been focused on network management and device support. Resources and budget have been assigned according to this mandate. In the diagram below, it is clear the County's IT Division is very much a Solid Utility. This provides for a stable technology environment but does make it challenging to move forward with the digitization of services and really being able to leverage technology to find efficiencies and improvements.

The main challenge is that business units would like to get more support and advice from technology experts, more the role of "partner player" as illustrated below.

As a "**Partner player**", IT would be integral to how the organization does business, to closely partner with business units to help them identify, plan, and deliver transformation initiatives. Many staff, in particular leadership, would like to see IT operate at this level.

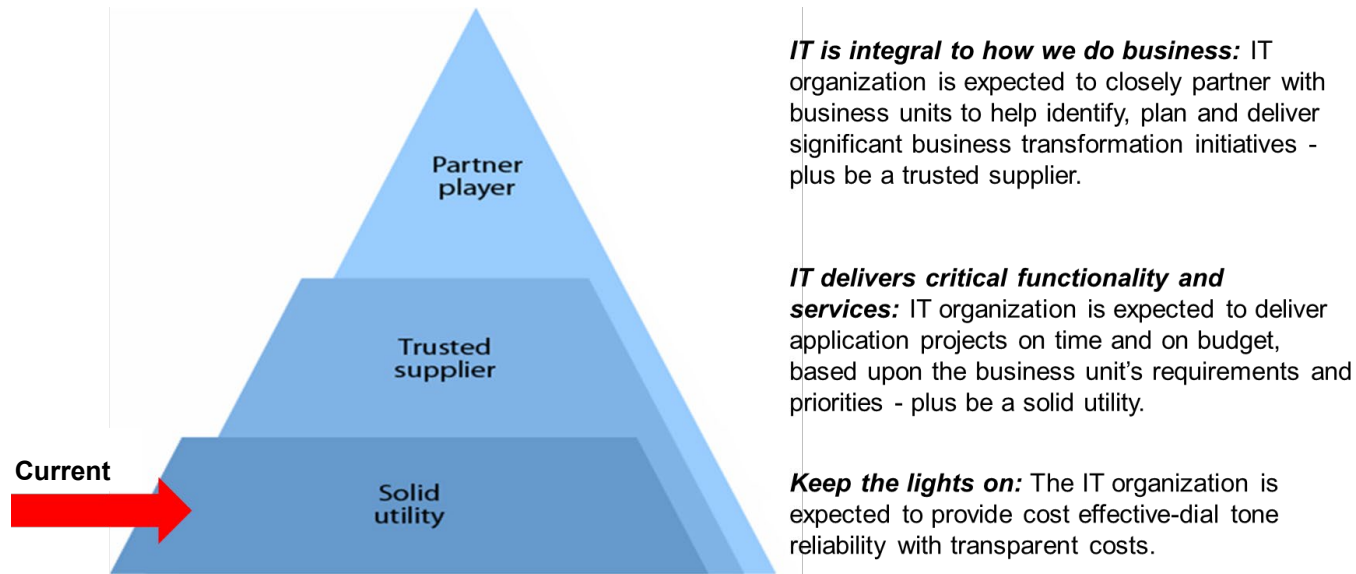


Figure 2: Different Roles of IT

This limited mandate for IT has led to an ad hoc and variable approach that is open to interpretation by each team, division and department when acquiring technology or digital solutions. This contributes to a complex and somewhat mixed environment where various teams are pulling in different directions.

2.2 IT Organization Structure

The IT team is reasonably well-equipped to manage the core, utility IT services, providing core IT infrastructure and IT support. Some small changes in philosophy and approach – with IT functioning more as an enabler, rather than a gatekeeper or controller in these areas – will be key to the organization getting more value from these functions.

However, there are some important gaps in resourcing, and these gaps correspond to areas where the County has low maturity as identified in the Current State Report.

The business solutions space is not resourced in IT and this is the area in which the MTM reveals challenges.

In addition, the following areas also require additional resources, and these correspond to the areas that exhibit low maturity in the IT Management practices assessment.

- Governance and project portfolio management.
- Project Management.
- Business Analysis.
- Data and analytics.
- Digital solutions.

Looking forward, the County will need to make investments in these areas to advance its technology and digital capabilities.

2.3 The Challenge

The Current State Assessment confirmed that the County of Renfrew has some significant work ahead.

To date, the IT team has had the mandate to focus on network infrastructure and general support. This has worked well in the past and IT has grown accordingly, however, this model no longer works in today's digital world. Business departments are looking for more technical and digital expertise from their IT resources. Help is needed in moving more and more services to the Cloud, to navigating the world of mobile service delivery and, of course, managing the risk of cybersecurity.

A shift is needed – not only in the resources and skill sets within IT, but also in the way the organization plans how to move forward – in order to deliver these new expectations and new outcomes. As an organization, the County must develop its digital savviness and awareness across the organization, building a digital culture where technology and digital is recognized as being central to service delivery, efficiency and effectiveness.

A new direction needs to be established. One that will define how technology can be better leveraged to enhance the effectiveness of service delivery but also provide a focus on the digital projects that will establish corporate technology foundations and enable future growth and scalability that will meet the changing expectations.

As noted in the 2020 Service Review, there are numerous opportunities across the County to use technology to deliver more effective customer service and to deliver more cost-effective services.

Local government is at a tipping point – where service is increasingly digital, where leveraging digital technology must become a core capability of any effective municipality, and where municipalities move from face-to-face, paper-driven processes, to automated, digitized and self-serve services that are designed for the next quarter century.

3.0 Digital Strategy

Management and staff across the County voiced the need to digitize current manual, paper-based processes as well as modernize the tools they use daily. The County's workforce should be fully empowered by technology, providing them with the ability to work remotely, use data to make better decisions and spend less time on administrative tasks that could be digitally automated.

In response to the changing expectations of customers and staff, the following section illustrates a more online enabled set of services that the County could offer.

This Digital Strategy for Renfrew is designed to maximize business benefits of data assets and technology-focused initiatives. The success of this strategy hinges on the requirement for a cross-functional team and executive leadership. It involves breaking down any silo between the information technology team and those of other customer-facing departments to deliver a consistent digital customer experience.

The Service Review project identified the need for "*modernization*." Municipalities are looking closely at their existing processes and want to identify ways to improve them so significantly that they transform the processes into something new and improved.

SLT prioritized the need to move forward and provide more up-to-date technology and tools to help staff to deliver services. A strategic direction set by the leadership is vital to achieving such transformation. Modernization or transformation is a major undertaking and should be done for the right reasons. There should be no transformations that do not add value to the business.

3.1 Building Digital for Renfrew County – Areas of Focus

The following areas represent the key areas of focus that are aligned with the goals previously identified in this report as well as those noted in the Service Review Report. These areas of focus frame the workplan recommendations:

- Foundational IT Structure.
- Digital Services for Residents and Businesses.
- Digitized End-to-End Business Processes Supported by Fully Utilized Business Solutions.
- A Modern Workplace for a Modern Workforce.

3.1.1 Foundational IT Structure

Technology Infrastructure underpins almost everything that the County does. IT infrastructure includes email, voice, radio and data networks, servers, personal computers, business solutions and online services.

To date, the IT team has done a good job of building and managing this infrastructure, providing good PCs/laptops, fast network connections for most facilities and reliable email services. The staff survey indicates overall satisfaction with these core IT services. However, feedback also revealed increasing expectations from IT for even more services as well as a requirement for technology and tools that are not currently available at the County (that have been implemented by other municipalities).

The County needs to enhance its overall service delivery, however, before it can deliver truly great end-to-end digital services, back-office processes must be digitized so that staff can manage workflows digitally.

3.1.2 Digital Customer Service

The County is in the customer service business and its goal as a service provider is to provide easy-to-use, simple services to residents, customers, and the local municipal partners. In today's world, residents do their banking online as well as buy products and services online. They also expect to be able to access government services from their smartphone or their tablet, any time and from anywhere.

In the future, customers should be able to visit the County's website via their smart device to easily and quickly:

- Report a problem/request for service or maintenance and track its resolution (receiving updates along the way).
- Meet with staff to discuss available services (e.g. housing, homelessness)
- Make a purchase (e.g., burn permits, property information requests).
- Make payments and manage accounts (e.g., pay an invoice, set up a direct deposit, review an account,).
- Submit applications and drawings and track the application progress (e.g., Development Applications, Permits, etc.).
- Submit forms (e.g., FOI requests, etc.).

3.1.3 Digitizing Business Processes

However, before the County can deliver genuinely great end-to-end digital services, back-office processes must be digitized so that staff are able to manage workflows digitally.

End-to-end digitized business process work is needed in numerous areas, including:

- A review of the Payroll Time Entry systems currently in place.

- A new enterprise HR system.
- End-to-end automation in business solutions / applications.
- Issues with applications and applied workarounds becoming accepted long-term solutions by users.
- The multitude of data that is captured on paper first and then entered into a system (e.g., GIS, timesheets, vacation requests, etc.)

Moving forward, the County should expect to:

- Use data, analytics, and dashboards to inform decision-making and to help optimize the application of resources.
- Embed GIS / spatial understanding into each of its processes.

3.1.4 Digital Workforce and Workplace

Mobile will be central to the realization of the full benefits of Great Plains, GIS and Microsoft Office products and using mobile technologies (including connectivity and security, devices and business solutions) to access County information while on the go will be key for staff – from Public Works and Paramedics staff to staff who will continue to work from home.

Mobile technologies will allow a customer request (about a downed sign, for instance) to be directed to a field crew almost immediately and then the progress and completion can be tracked by back- and front office-staff.

If the County is to be a more modern, digital organization, then it must also make available simple and easy collaboration capabilities for staff – enabling staff to do their best work by using the tools best suited to the job. This will include:

- Increased use of mobile friendly devices – laptops, tablets – providing individuals and teams with choices of devices that best meet their needs.
- Improved internal online services such as attendance, time management, internal forms, etc.
- Team messaging, chat and a more robust intranet – helping co-workers connect and interact in real-time.
- Improved document collaboration, versioning, co-editing and simplified processes to comply with accessibility requirements.
- Increased adoption of remote and flexible working – enabling staff to work from the office, from a partner’s office space, from the construction site, from a coffee shop or from home – essentially “work from anywhere.”

3.2 Benefits Realization

Benefits are often incremental and distributed across many staff members, and also often take on a form of cost avoidance. They can manifest as reductions in administrative time tied up with paperwork, an increase in the number of inspections or work orders that a member of staff can complete in a given time, or a reduction in the number of activities taken to complete a task.

Individually these may be small, but collectively they accumulate and can have a large impact as illustrated by the time and attendance initiative in the previous sections.

The County should track and report on its success against achieving goals set out in business cases, and SLT should work with business teams to ensure that savings goals are realized, recovered, and reinvested appropriately.

4.0 Roadmap

The following table identifies specific initiatives with their related cost estimates and a brief summary of the benefits.

The SLT Priority column indicates the priority set Senior Leadership Team at the County. Other projects are included based on municipal best practices. The proposed IT Steering Committee may re-prioritize the Work Plan, if required. The colours indicate the alignment with the Municipal Technology Model layers.

- **Green** / G – Governance
- **Yellow** / B – Business Solutions
- **Blue** / S – Infrastructure
- **Orange** / C – Customer-Facing
- **Grey** / I – Integration

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
2022				
G	Establish IT Governance Committee	N/A	N/A	Gives oversight of all IT activities ensuring alignment to corporate objectives.
G	IT Project and Portfolio Intake and Management Process	N/A	N/A	Allows the County to take on projects based on organizational value.
G	IT Organization Changes	TBD	TBD	Aligns resources to opportunities and projects that align with Corporate goals.

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
S-1	Cyber Security Program			Enhancing the existing program will help to mitigate the risk of personal actions causing a security incident.
S-2	Business Continuity / Disaster Recovery Plan	\$50k	TBD	Reduces costs associated with IT service disruptions and allows for the continuity of core municipal services.
G-6	Cloud Governance and Policy	N/A	N/A	Facilitates a decision-making process about whether or not solutions can be moved to the Cloud. Also ensures the whole organization understands what is and is not permissible. Data protection is key.
S	Annual Hardware Refresh / Upgrades	As per budget	As per budget	The technology infrastructure must be maintained and renewed on a regular basis to ensure a strong foundation for solutions and future deliverables.
S	Ongoing Security Enhancements	TBD	TBD	Addresses all gaps and vulnerabilities identified in security assessments.
S	Review / Upgrade Internet Connectivity Contract	As per budget	As per budget	Approved project.

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
S	Enhance Mobile / Field / Vehicle Technology	N/A	\$15k	<p>Expand current policy to allow for greater access to mobile tools, including specialized devices suited for Emergency Services and in the LTC facilities.</p> <p>Should also include a Mobile Device Management (MDM) solution to enable the County to manage mobile devices such as erasing them if lost or stolen.</p>
S	M365 Assessment	TBD	TBD	Enhanced collaboration capabilities, potential more effective use of online tools to offset costs for other solutions.
S	Next Gen 911 Readiness Assessment	TBD	TBD	To identify the scope and scale of requirements necessary to meet the National Emergency Number Association (NENA) standard.
B-4	Implement HR Solution	\$150 – 200k	\$30 – 60k annually	<p>Improved business processes and better integration of different department functions and data.</p> <p>Reduced HR Staff workload by adding self-service capabilities.</p> <p>Improved decision-making by making key data more available.</p>

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
B	Payroll Solution	TBD	TBD	Efficiency improvements and improved data reliability and accessibility.
B	Digital Agendas and Minutes	TBD	TBD	<p>A solution that enables the easier creation of digital agendas and minutes should be reviewed.</p> <p>These solutions provide not only a digital version but have workflows built in to provide a more streamlined process.</p>
B-7	Digital Authorizations	N/A	TBD	Establish Digital Approvals and Signatures Policy / practice and rapidly expand use of digital signatures.
G-10	AODA Compliance Policy & Procedures	TBD	TBD	<p>An Accessibility Policy including clear processes and procedures should be developed. This will assist with ensuring the appropriate level of effort required for compliance.</p> <p>This policy could be developed as part of the Document & Records Management Plan.</p>

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
C-3	Establish a program for digital forms and online requests	TBD	TBD	<p>The County should work on converting all its forms into eForms, starting first with the highest volume forms that will have the largest impact to customers.</p> <p>While building online forms is not the answer to complete services and full end-to-end digitization, it is a suitable interim step that provides improved services to customers at a relatively low cost.</p> <p>Note the current website provider offers a good eForms solution.</p>
2023				
G	Begin to develop Business Solution Roadmaps	N/A	N/A	Develop multi-year Business Solutions roadmaps in partnership with the governance team to determine lifecycles, upgrades, expansion opportunities, etc.
G	IT Service Catalogue	N/A	N/A	The development of an IT Service Catalogue will serve as a single source of information for all the IT services provided.
G	User Training Program	TBD	TBD	Better utilization of technical assets and increased technical literacy and understanding of staff.

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
S	Annual Hardware Refresh / Upgrades	As per budget	As per budget	The technology infrastructure must be maintained and renewed on a regular basis to ensure a strong foundation for solutions and future deliverables.
S	Ongoing Security Enhancements	As per budget	As per budget	Addresses all gaps and vulnerabilities identified in security assessments.
B	Document and Records Management Plan	\$30k	TBD	<p>Overall improvement of service delivery, reduce costs and realize efficiencies through digitization opportunities and electronic records accessibility.</p> <p>Reduce the effort required to locate documents/files and reduce the physical file storage space.</p> <p>Improve access to key documents as part of a Business Continuity Plan.</p> <p>Funding requirement is for external consulting assistance.</p>
B-5	Paramedic Systems Review	\$20k	N/A	<p>Planned and prepared approach to understand business needs relative to available technology.</p> <p>Funding requirement is for external consulting assistance.</p>

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
B	Asset Management and Work Order Solution	\$100k – 250k	\$50-80k	<p>The County's Asset and Work Management systems need a clear strategy for growth.</p> <p>The recommendation is to implement a series of short-term or interim solutions to support its immediate needs as well as develop a longer-term roadmap.</p>
B	Public Works Systems Review	N/A	N/A	<p>A review of the different systems currently in use should be done to reduce the number of systems and workarounds but also to leverage the tools available.</p>
B	Review Yardi	N/A	N/A	<p>The Yardi system is primarily supported by the vendor but is reaching end-of-life.</p> <p>There is the need for IT expertise to help find a replacement and to work with other municipalities to define options.</p>

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
B	Fit/Gap Analysis of Great Plains financial system	\$50k	N/A	<p>The financial system has additional functionality available and should be more fully integrated for greatest efficiency and effectiveness.</p> <p>Staff may be able to be more efficient with automated processes and expanded GP functionality.</p> <p>A more integrated solution will provide better data to improve overall decision-making and insights.</p> <p>Funding requirement is for external consulting assistance.</p>
I-8	GIS Strategy	\$75 – 100k	N/A	<p>Develop a plan or roadmap to establish a foundation that can be leveraged across the County to share GIS resources and educational materials.</p>
I	Integration Tool	TBD	TBD	<p>Could be part of the larger Integration and Data Management Plan or an interim solution and procedure be implemented.</p>

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
C	CRM Solution	TBD	\$15k annual fee	Implement a 'lite' CRM tool, (Customer Relationship Management) solution to provide a centralized location to manage customer relations for improved service delivery.
C	Online Facility / Meeting Room Booking Solution			A solution to help facilitate online booking of meeting rooms, facility space.
C	Intranet	TBD	TBD	An intranet can serve as a key communications and information sharing tool. Should be easy-to-use, include single sign on (SSO) and be convenient. May be an outcome of the M365 implementation.
2024				
S	Ongoing Hardware Refresh / Upgrades	As per budget	As per budget	The technology infrastructure must be maintained and renewed on a regular basis to ensure a strong foundation for solutions and future deliverables.
S	Ongoing Security Enhancements	As per budget	As per budget	Addresses all gaps and vulnerabilities identified in security assessments.

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
B	Land and Property Management Solution	\$100 – 150k	\$30 – 50k	Automation and efficiency opportunities when using a full-service solution. Municipalities are implementing this type of system to enable modernizing of all components of Planning and Development services. Also provides for integration of data into GIS.
B-9	Digital Purchasing Solution	TBD	TBD	Several departments noted the need for digital purchase orders, as well as tracking and status updates. May be an outcome of the analysis of the FIS project.
I	Integration and Data Management Strategy	\$25k	TBD	Develop an Integration and Data Management Plan that includes defined integration standards, data standards and classification, and sources of “master” data. Funding is required for external consulting assistance.
C	Review Community Engagement Tools	TBD	TBD	Digital tool that makes it easier to digitally engage with the community on particular topics, projects or to get feedback.

SLT Priority	Opportunity	Capital Impact	Operating Impact	Summary of Benefits
C	Community Emergency Notification System	TBD	TBD	A digital solution that makes it quick and easy to push out notifications to the community.
C	Mobile County App	TBD	TBD	A mobile app that provides easy access through a smartphone to the customer portal and other online applications.
2025				
S	Annual Hardware Refresh / Upgrade	As per budget	As per budget	The technology infrastructure must be maintained and renewed on a regular basis to ensure a strong foundation for solutions and future deliverables.
S	Ongoing Security Enhancements	As per budget	As per budget	Addresses all gaps and vulnerabilities identified in security assessments.
C	Ongoing additions to Online Services through the Customer Portal	TBD	TBD	Continue to grow the online opportunities to increase the number of digital services offered to customers. Improve staff efficiency with more fully automated processes.

5.0 Conclusion

There is the opportunity to change the approach and thinking of service delivery with a move away from a document-and-paper-centric mindset towards a more digital-and-customer-centric one. The County has invested in technologies over the years, but not always from a corporate viewpoint. Siloed thinking and lack of technology governance has resulted in individual departments procuring their own systems.

The digital approach can be replicated to many services that cross organization boundaries and this will undoubtedly increase service integration, transparency between teams and business units, reduce duplication and simplify and. Improve service delivery to customers. This work can help drive dramatic improvements to the staff and customer experience and radically reduce administrative overhead.

Ultimately, the digital approach described in this plan will help the County to focus attention on prioritized key projects that will continue to build a strong foundation but also provide for the opportunities to deliver digitally-powered County services moving forward.

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