CITY OF
Thunder Bay
Superior by Nature

AGENDA MATERIAL

COMMITTEE OF THE WHOLE

MEETING DATE: **MONDAY, DECEMBER 20, 2021**

LOCATION: **S. H. BLAKE MEMORIAL AUDITORIUM**
(Council Chambers)

TIME: **6:30 P.M.**

MEETING: Committee of the Whole

DATE: Monday, December 20, 2021   *Reference No.*   COW - 3/53

CLOSED SESSION in the McNaughton Room at 4:30 p.m.

Committee of the Whole - Closed Session
Chair: Councillor Aldo Ruberto

Closed Session Agenda will be distributed separately to Members of Council and EMT only.

OPEN SESSION in S.H. Blake Memorial Auditorium at 6:30 p.m.

Committee of the Whole - Administrative Services Session
Chair: Councillor Mark Bentz

DISCLOSURES OF INTEREST

CONFIRMATION OF AGENDA

Confirmation of Agenda - December 20, 2021 - Committee of the Whole (Page 7)

WITH RESPECT to the December 20, 2021 Committee of the Whole meeting, we recommend that the agenda as printed, including any additional information and new business, be confirmed.

PRESENTATIONS

Monthly – Citizens of Exceptional Achievement Award

Memorandum from Deputy City Clerk Dana Earle dated December 6, 2021 requesting an opportunity to provide a presentation relative to the Monthly Citizen of Exceptional Achievement Awards. **(Pages 8 - 9)**

ITEMS ARISING FROM CLOSED SESSION

REPORTS OF COMMITTEES, BOARDS AND OUTSIDE AGENCIES

Coordinating Committee Minutes

Minutes of Meeting 01-2021 and 02-2021 of the Coordinating Committee held on February 22, 2021 and June 14, 2021 respectively, for information. **(Pages 10 - 17)**

Anti-Racism & Respect Advisory Committee Minutes

Minutes of Meeting 07-2021 of the Anti-Racism & Respect Advisory Committee held on October 18, 2021, for information. **(Pages 18 - 22)**

Audit Committee Minutes

Minutes of Meeting 02-2021 of the Audit Committee held on July 13, 2021, for information. **(Pages 23 - 28)**

Official Recognition Committee Minutes

Minutes of Meeting 05-2021 of the Official Recognition Committee Citizens of Exceptional Achievement held on November 9, 2021, for information. **(Pages 29 - 32)**

REPORTS OF MUNICIPAL OFFICERS

Corporate Digital Strategy

At the November 22, 2021 Committee of the Whole meeting, Report R 160/2021 (Corporate Services & Long-Term Care – Corporate Information Technology) was introduced as a 'first report' to allow Committee of the Whole and the general public time to consider the implications of the report before the recommendations are considered by Committee of the Whole on December 20, 2021.

Report R 160/2021 (Corporate Services & Long Term Care - Corporate Information Technology) recommending that the Corporate Digital Strategy as outlined in Attachment A be approved in principle to guide the future direction and investment in information technology, digital transformation & modernization of service delivery, re-presented. **(Pages 33 - 198)**

Memorandum from Manager - Corporate Information Technology Jack Avella dated December 8, 2021 relative to the above noted, for information. **(Page 199 - 204)**

WITH RESPECT to R 160/2021 (Corporate Services & Long-Term Care – Corporate Information Technology), we endorse the Corporate Digital Strategy as outlined in Attachment A to guide future direction and investment in information technology, digital transformation & modernization of service delivery;

AND THAT Administration include the financial impacts of this work in annual Operating and

Capital Budgets for Council consideration in future budget submissions;

AND THAT Administration report back to Council annually on the progress of the Digital Strategy implementation & associated work plan items;

AND THAT any necessary by-laws be presented to Council for ratification.

2022 Interim Tax Levy

Report R 178/2021 (Corporate Services & Long Term Care - Revenue) recommending an interim tax levy and due dates for 2022. **(Pages 205 - 207)**

WITH RESPECT to Report R 178/2021 (Corporate Services & Long Term Care - Revenue) we recommend that the 2022 interim tax levy be established at 50% of the 2021 final tax obligation;

AND THAT the 2022 interim tax levy be due in two installments, March 2 and May 4;

AND THAT the penalty shall be one and one-quarter per cent (1.25%) of the amount in default on the first day immediately following the installment due date for tax installments due in 2022;

AND THAT interest shall be one and one-quarter per cent (1.25%) against all amounts that have become due and remain unpaid. Such interest shall be calculated and imposed on the first day of the calendar month.

AND THAT any necessary by-laws be presented to City Council for ratification.

Tbaytel Dividend Model

Report R 189/2021 (Corporate Services & Long Term Care - Financial Services) providing information relative to the above noted and recommending that the Tbaytel Dividend policy be revised. (Distributed Separately)

Indigenous Relations & Inclusion Annual Report

Report R 143/2021 (City Manager's Office - Strategic Initiatives & Engagement) City of Thunder Bay Annual Report under the 2021-2027 City of Thunder Bay Indigenous Relations and Inclusion Strategy ("the IRI Strategy"). **(Pages 209 -234)**

Memorandum from Director - Strategic Initiatives & Engagement Tracie Smith dated November 16, 2021 requesting an opportunity to provide a presentation relative to the above noted. **(Page 235)**

City of Thunder Bay 2019-2022 Corporate Strategic Plan Third Progress Update

Report R 166/2021 (City Manager's Office - Strategic Initiatives & Engagement) City of Thunder Bay 2019-2022 Corporate Strategic Plan – Implementation Plan, Third Progress Update, for information. **(Pages 236 - 249)**

Memorandum from Director - Strategic Initiatives & Engagement Tracie Smith dated November 16, 2021 requesting an opportunity to provide a presentation relative to the above noted. **(Page 251)**

2021 Corporate Safety Mid-year Summary Report

Report R 176/2021 (City Manager's Office - Human Resources & Corporate Safety) providing an update of Corporate Safety section activities for the period of January – September 2020. As proposed in the Memo to Council dated February 11 2020, this report is intended to provide an update of basic statistics with follow-up analysis and interpretation to be provided in the full year report to be presented in Q2 2022, for information. **(Pages 251 - 256)**

Recruitment Process Improvement Project

Report R 182/2021 (City Manager's Office - Human Resources & Corporate Safety) providing information relative to the outcome of the Recruitment Process Improvement Project, identified as a recommendation in the Grant Thornton Program and Service Review. **(Pages 258 - 316)**

Memorandum from Director - Human Resources & Corporate Safety Karie Ortgiese dated December 3, 2021 requesting an opportunity to provide a presentation relative to the above noted. **(Page 317)**

Strategy Development for Reducing Homelessness and Poverty in Our Community

At the November 1, 2021 Committee of the Whole meeting a motion was passed directing Administration to provide options for a multi-faceted approach to finance, leverage and influence solutions to address homelessness and poverty in Thunder Bay and that the options include specific concepts/strategies for the municipality to act as a catalyst and facilitator to address identified gaps, and that the options include opportunities for Council to advocate, partner and work together with agencies, other levels of government and grass roots community groups to achieve positive outcomes. **(Pages 318 - 327)**

Report R 181/2021 (Development & Emergency Services - Community Strategies) providing a recommendation, relative to the above noted.

WITH RESPECT to Report R181/2021 (Development & Emergency Services – Community Strategies), we recommend the strategies outlined in this Report be approved;

AND THAT Administration review the Community Partnership Policy (05-06-02) and related procedures for changes that would be required for it to align well with other relevant capital grant sources and for it to support capital projects that address community safety, well-being, homelessness and poverty, with a focus on gaps identified in this report and report back Q2, 2022;

AND THAT Administration report back at Q2, 2022 with a source of financing to bring the uncommitted balance of the Community Partnership Reserve Fund to $1M;

AND THAT sustaining Community Partnership Reserve Fund contribution be included in the

proposed 2023 budget;

AND THAT the Community, Youth & Cultural Funding Program (CYCFP) Funding Model and associated Community Stream funding criteria be revised to include the framework and priorities of the Community Safety & Well-being Plan for Projects, beginning with the October 2022 intake, and for Operating/Sustaining Grants, beginning with the June 2022 intake for 2023 funding;

AND THAT the general eligibility criteria, application and review processes of CYCFP be reviewed with the objective of increasing applications and success rate for organizations and projects related to community safety, well-being, homelessness and poverty, and Administration report back to Council for information or approvals as required;

AND THAT the Manager - Community Strategies, or designate, be included in the CYCFP Administrative and Grant Review Teams as the Funding Program Supervisor for the Community Stream;

AND THAT Administration make recommendations to Council in the annual Funding Program report in January 2022, should final 2022 funding recommendations justify an increase to Funding Program caps;

AND THAT City Council, through the Inter-Governmental Affairs Committee, endorse and support the advocacy requests made by the District of Thunder Bay Social Services Administration Board of Directors at the Association of Municipalities of Ontario (AMO) Conference 2021;

AND THAT Administration review the advocacy recommendations contained in the Thunder Bay Drug Strategy, Poverty Reduction Strategy, and Thunder Bay & Area Food Strategy and provide further recommendations to the Intergovernmental Affairs Committee;

AND THAT any necessary by-laws be presented to City Council for ratification.

2022 Amended Calendar of Meetings

At the October 26, 2020 Committee of the Whole meeting, Report R 124/2020 (City Manger's Office - Office of the City Clerk) was adopted recommending that the proposed calendars of regularly scheduled meetings of Committee of the Whole, City Council and City Council - Special Session Meetings for 2021 and 2022, be adopted.

Report R 184/2021 (City Manager's Office - Office of the City Clerk) recommending that the 2022 meeting calendar, as amended, for regularly scheduled meetings of Committee of the Whole, City Council and City Council - Special Session Meetings in 2022, be adopted. **(Pages 328 - 331)**

WITH RESPECT to Report R 184/2021 (City Manager's Office – Office of the City Clerk), we recommend that the 2022 Committee of the Whole, City Council and City Council – Special Session Meeting Calendar, as amended, be adopted;

AND THAT any necessary by-laws be presented to Council for ratification.

FIRST REPORTS

PETITIONS AND COMMUNICATIONS

Outstanding Item - Transition to Prudent Investor Standard and Invest Statement

Memorandum from Director - Financial Services Emma Westover dated December 12, 2021 recommending that the report back date for Outstanding Item 2021-108-ADM, Transition to Prudent Investor Standard and Investment Policy Statement to be changed from December 20, 2021 to January 24, 2022. **(Pages 323 - 333)**

WITH RESPECT to the Memorandum from Director – Financial Services, Corporate Services & Long term Care Emma Westover dated December 9, 2021, we recommend that the report back date relating to Outstanding Item 2021-108-ADM – Transition to Prudent Investor Standard - Update be changed from December 20, 2021 to January 24, 2022.

Thank you from Emergency Management Ontario

Memorandum from City Manager Norm Gale dated December 9, 2021 relative to the above noted, for information. **(Pages 334 - 337)**

OUTSTANDING ITEMS

Outstanding List for Administrative Services as at December 6, 2021

Memorandum from City Clerk Krista Power, dated December 6, 2021 providing the Administrative Services Outstanding Items List, for information. **(Pages 338 - 339)**

NEW BUSINESS

ADJOURNMENT

MEETING DATE 12/20/2021 (mm/dd/yyyy)

SUBJECT   Confirmation of Agenda - December 20, 2021 - Committee of the Whole

SUMMARY

Confirmation of Agenda - December 20, 2021 - Committee of the Whole

RECOMMENDATION

WITH RESPECT to the December 20, 2021 Committee of the Whole meeting, we recommend that the agenda as printed, including any additional information and new business, be confirmed.

MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Monthly – Citizens of Exceptional Achievement Award

SUMMARY

Memorandum from Deputy City Clerk Dana Earle dated December 6, 2021 requesting an opportunity to provide a presentation relative to the Monthly Citizen of Exceptional Achievement Awards.

ATTACHMENTS

1. Memo - D. Earle - Dec 6, 2021 - Monthly Award Presentation

Memorandum

TO: Members of City Council

FROM: Dana Earle, Deputy City Clerk

DATE: December 6, 2021

SUBJECT: Monthly – Citizens of Exceptional Achievement Award
Committee of the Whole – December 20, 2021

Please be advised that Fridays for Future Thunder Bay will be awarded a certificate for their leadership in the community on climate change awareness and will be recognized virtually at the December 20, 2021 Committee of the Whole meeting.

MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Coordinating Committee Minutes

SUMMARY

Minutes of Meeting 01-2021 and 02-2021 of the Coordinating Committee held on February 22,
2021 and June 14, 2021, respectively,   for information.

ATTACHMENTS

1. Coordinating Committee Minutes - February 22, 2021
2. Coordinating Committee Minutes - June 14, 2021

DATE: FEBRUARY 22, 2021   **MEETING NO. 01-2021**

TIME: 4:02 PM

PLACE: MS TEAMS

CHAIR: MAYOR BILL MAURO

MEMBERS: **OFFICIALS:**

Mayor Bill Mauro   Norm Gale, City Manager
Councillor Mark Bentz, Chair – Administrative   Krista Power, City Clerk
   Services   Dana Earle, Deputy City Clerk
Councillor Brian McKinnon, Chair - Operations   Gordon Stover, Committee & Meeting
Councillor Shelby Ch'ng, Chair – Community   Management System Coordinator
   Services
Councillor Andrew Foulds, Vice-Chair –
   Community Services & Planning Services
Councillor Aldo Ruberto, Chair – Planning
Councillor Brian Hamilton, Vice-Chair –
   Administrative Services

AGENDA

1.0   DISCLOSURES OF INTEREST

    None.

2.0   AGENDA APPROVAL

    MOVED BY: Councillor Brian McKinnon
    SECONDED BY: Councillor Mark Bentz

    With respect to the February 22, 2021, Coordinating Committee meeting, we
    recommend that the agenda as printed, including any additional information and new
    business, be confirmed.

    CARRIED

3.0   MINUTES OF PREVIOUS MEETING

    MOVED BY: Councillor Shelby Ch'ng
    SECONDED BY: Councillor Aldo Ruberto

THAT the Minutes of Meetings No. 01-2020 of the Coordinating Committee, held on February 24, 2020 be confirmed.

CARRIED

4.0   PROCEDURAL BY-LAW

4.1   Role of the Chair

City Clerk Krista Power provided an overview relative to public concerns with respect to Council rules and decorum.

- Chairs should focus on the rules of procedure rather than courtesy of Members including speaking limits, rounds of speaking, questions and refraining from long preambles.
- Role of the Chair was described as per the Procedural By-law including Calling to Order and Point of Privilege as well the expected conduct and responsibility of all Members of Council.
- The consequences under Failures to Obey the Procedures Rules were explained.

Discussion was held relative to the time length for preambles and the repetition of questions as they contribute to the extended time of meetings.

Concerns were expressed relative to the number of rounds of questions and whether or not these need to be reduced to fewer than outlined in the Procedural Rules.

Consistency among the Chairs for enforcing the rules of procedure should be a priority.

It is important that Council Members understand that Chairs run the meeting, and for the Chairs to understand the Procedural Rules. The Clerk can provide assistance to the Chairs with training prior to meetings and support while at the meetings.

Mayor Bill Mauro will follow-up with the City Clerk to review the discussion from this meeting, summarize for the Chairs and send a reminder email to all Members of Council.

4.2   Update on Proposed Changes to Procedural By-law

The City Clerk advised that the updated draft Procedural Rules were distributed with the agenda for discussion.

The following is a breakdown of the changes included in the draft by-law:

- Removal of gender and the use of pronouns – Sections 1.02(a) and 1.03:
- Clarification – Defeat of a By-law – Section 5.15 (e):
- City Council – Public Meeting, Speaking Limits and Speakers – Section 5.11:
- Addition of reasons to establish Closed Session – Section 3.12:
- Electronic Participation – Section 3.14:
- Deputations – Section 5.08 (e):
- Limits on Speaking – Section 7.08
- Housekeeping Updates

Input from Committee members was received throughout the discussion and the following points were reviewed and clarified in detail:

- Duties and Responsibilities of a Councillor
- Duties and power of the Chair
- Order of Proceedings
- Inclusion and presentation of New Business items.

MOVED BY: Councillor Brian McKinnon
SECONDED BY: Councillor Aldo Ruberto

With respect to the City of Thunder Bay City Council Procedural Rules, we recommend that the revised Procedural Rules By-law as amended at the February 22, 2021 Coordinating Committee, be approved;

CARRIED

The Committee was advised that the approved Procedural By-law will tentatively be scheduled for presentation at an April 2021 Committee of the Whole meeting.

5.0   PROXY VOTING – MUNICIPAL ELECTIONS

The City Clerk provided an overview relative to allowance of Members to delegate a proxy for the purpose of registering a vote on agenda items before Council when a Member is away/absent.

Information was provided with respect to challenges due to potential conflicts of interest between Members.

It was further noted that due to extension of electronic meetings, all Members continue to be able to attend and vote virtually, thus a proxy voting process is not required at this time.

6.0   NEXT MEETING

The next meeting will be held later in 2021 at the call of the Chair.

7.0   ADJOURNMENT

The meeting was adjourned at 5:18 p.m.

| **DATE:** | JUNE 14, 2021 | **MEETING NO. 02-2021** |

TIME: 4:02 PM

PLACE: MS TEAMS

CHAIR: MAYOR BILL MAURO

MEMBERS:	**OFFICIALS:**
Mayor Bill Mauro	Norm Gale, City Manager
Councillor M. Bentz, Chair – Administrative Services	Krista Power, City Clerk
Councillor Brian McKinnon, Chair - Operations	Dana Earle, Deputy City Clerk
Councillor Shelby Ch'ng, Chair – Community Services	Gordon Stover, Committee & Meeting Management System Coordinator
Councillor Andrew Foulds, Vice-Chair – Community Services & Planning Services	
Councillor Aldo Ruberto, Chair – Planning	
Councillor Brian Hamilton, Vice-Chair – Administrative Services	

AGENDA

1.0   DISCLOSURES OF INTEREST

       None.

2.0   AGENDA APPROVAL

       MOVED BY: Councillor Aldo Ruberto
       SECONDED BY: Councillor Brian McKinnon

       With respect to the June 14, 2021, Coordinating Committee meeting, we recommend that the agenda as printed, including any additional information and new business, be confirmed.

       CARRIED

3.0   REVIEW OF MEETING MANAGEMENT PROTOCOLS FOR CHAIRS AND VICE-
        CHAIRS

Mayor Bill Mauro expressed a concern relative to the role of the Chair at Committee of
the Whole meetings with respect to efficiency, calling Members out of order, speaking
respectfully, limiting time for preambles and questioning.

City Clerk Krista Power provided an overview of the following:

•   Reviewed the Rules of Speaking as outlined in the Procedural Rules
•   Process for preambles, comments, Points of Order vs Point of Privilege, and
           challenging the Chair
•   Point of Clarification is not included in the Procedural By-law
•   Chairs have the ability to support each other and reach out for assistance.

Discussion was held relative to the roles and responsibilities of Members of Council as
well as the process for removing a Member for inappropriate decorum and behaviour.

4.0   UPDATE ON PROCEDURAL BY-LAW PRESENTATION

4.1   First Reports

Mayor Bill Mauro requested clarification on when a deputant is allowed to speak on a
First Report.

The City Clerk advised that deputations are usually scheduled for the night of debate, not
the initial presentation of the First Report.

4.2   Outstanding Items – Addition To Agendas

The Office of the City Clerk records and updates the current 'outstanding list' of items
that have been directed by council to be presented by a certain date, this list is updated as
items are presented to council and removed from the list.

Discussion was held relative to adding the list of Outstanding Items at the end of the
Committee of the Whole agendas. This would give Council Members as well as
Administration an "early heads-up" for future reports and items as well as the proposed
date for presentation.

MOVED BY: Councillor Brian McKinnon
SECONDED BY: Councillor Aldo Ruberto

With respect to the City of Thunder Bay City Council Procedural Rules, we recommend that the revised Procedural Rules By-law as approved at the February 22, 2021 Coordinating Committee meeting be amended to include the addition of an Outstanding Items list to the Committee of the Whole agendas.

CARRIED

The City Clerk advised that the revised Procedural Rules will be presented to Committee of the Whole on June 28, 2021.

5.0   NEXT MEETING

The next meeting will be held later in 2021 at the call of the Chair.

7.0   ADJOURNMENT

The meeting was adjourned at 4:48 p.m.

MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Anti-Racism & Respect Advisory Committee Minutes

SUMMARY

Minutes of Meeting 07-2021 of the Anti-Racism & Respect Advisory Committee held on October 18, 2021, for information.

ATTACHMENTS

1. Minutes - Anti-Racism & Respect Advisory Committee - October 18, 2021

DATE: OCTOBER 18, 2021 **MEETING NO. 07-2021**

TIME: 12:04 P.M.

PLACE: VIRTUAL MEETING – MS TEAMS

CHAIR: JASON VELTRI

ELECTRONIC PARTICIPATION:
Breanne Anderson & Carol Audet, *Matawa First Nations*
Moffat Makuto, *Reg. Multicultural Youth Council*
Tannis Kastern, *Fort William First Nation*
Anita Muggeridge - *Thunder Bay Multicultural Association*
Beth Ponka, *Kinna-aweya Representative*
Ryan Scott, *Community Representative*
Jason Veltri, *Community Representative*
Sanjana Sharma, *LUSU Representative*
Ronnie Kasana, *SUCCI Representative*
Insp. Derek West*, Thunder Bay Police Service*

OFFICIALS – ELECTRONIC PARTICIPATION:
Cynthia Olsen, Manager – Community Strategies
Maureen Nadin, Committee Resource
Katie Piché, Council & Committee Clerk

A Moment of Silence was held for former Anti-Racism & Respect Advisory Committee member Angie Lynch.

1.0 LAND ACKNOWLEDGMENT

The Chair acknowledged that we are meeting on the traditional territory of the Ojibwa Anishinaabe people of Fort William First Nation, signatory to the Robinson Superior Treaty of 1850, and acknowledged the history that many nations hold, and are committed to a relationship with First Nations, Métis, and Inuit peoples based on the principles of mutual trust, respect, reciprocity, and collaboration in the spirit of reconciliation.

2.0 WELCOME, DISCLOSURES OF INTEREST

The Chair welcomed those in attendance. There were no disclosures of interest declared at this time.

3.0 CONFIRMATION OF AGENDA

MOVED BY: Tannis Kastern
SECONDED BY: Anita Muggeridge

WITH RESPECT to the October 18, 2021 meeting of the Anti-Racism & Respect Advisory Committee, we recommend that the agenda as printed, including any additional information and new business, be confirmed.

CARRIED

4.0   MINUTES OF PREVIOUS MEETINGS

The minutes of Meetings 05-2021 and 06-2021 of the Anti-Racism & Respect Advisory Committee held on May 31, 2021 and August 11, 2021 to be confirmed.

MOVED BY: Insp. Derek West
SECONDED BY: Moffat Makuto

THAT the Minutes of Meetings 05-2021 and 06-2021 of the Anti-Racism & Respect Advisory Committee, held on May 31, 2021 and August 11, 2021, be confirmed

CARRIED

5.0   CORPORATE RESTRUCTURE AND COMMITTEE PROGRAM SUPPORT

Memorandum from General Manager – Development & Emergency Services Karen Lewis and Director – Strategic Initiatives & Engagement Tracie Smith, dated October 14, 2021, relative to the above noted, for information.

Manager – Community Strategies Cynthia Olsen provided an overview relative to the above noted Memorandum and advised that the Manager of Community Strategies will now be the lead Administration to the Anti-Racism & Respect Advisory Committee to offer program support for the Committee.

6.0   NORTHERN ONTARIO HERITAGE FUND CORPORATION (NOHFC)
        INTERNSHIP APPLICATION UPDATE

Manager – Community Strategies Cynthia Olsen provided an update relative to the above noted and advised that the internship application has been approved. The Community Strategies Division is now finalizing the job description for the position.

7.0   LAKEHEAD SOCIAL PLANNING COUNCIL (LSPC)

Marie Klassen and Kristen Tomcko from LSPC provided a PowerPoint presentation and an overview relative to the Incident Reporting & Referral Service and 211.

The following information was provided:

- Overview of LSPC – 1 of 6 centres in Ontario – launched in 2008
- Offering services 24/7
- Serving all of Northern Ontario, including managing database of records
- Website: www.211north.ca
- Also managing other help lines
- 2014 Diversity Thunder Bay – approached LSPC in regards to an Anti-Racism help line
- Launched Incident Reporting in 2017
  - www.lspc.ca/incidentreporting
  - Needs assessment & survey
  - Fully trained staff/Community Resource Specialists
  - Find appropriate programs and services for people who call in to help line
  - 211 is access point
  - 27 incidents reported since new campaign launch in September 2021
  - Provide referrals to other services
  - Annual Incident Reporting report to Council to be drafted

The Chair thanked Marie Klassen and Kristen Tomcko from LSPC for attending the meeting and providing the Committee with an update of services.

8.0   STRATEGIC PLANNING RETREAT UPDATE

Memorandum from Chair Jason Veltri, dated October 15, 2021, relative to the above noted, for information.

Chair Jason Veltri provided a brief overview of the upcoming retreat. It was noted that Superior Strategies is in the process of developing the agenda as a World Café Style Roundtable.

Cynthia Olsen advised that the survey (relative to the Committee and the retreat) that had been completed by Committee members earlier in the year would be emailed again to Committee members. Due to a technical glitch, survey results had been lost from the first survey, and responses were required by Committee members again.

9.0   ROUNDTABLE

- Cynthia Olsen advised that there is currently a job posting for the City of Thunder Bay's Indigenous Relations Manager.

- Carol Audet introduced Breanne Anderson to the Committee and advised that she was Matawa's new Anti-Indigenous Racism Coordinator.

10.0   NEXT MEETING

The next meeting will be held on Monday, November 29, 2021 at 12:00 p.m.

11.0   ADJOURNMENT

The meeting adjourned at 1:04 p.m.

MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Audit Committee Minutes

SUMMARY

Minutes of Meeting 02-2021 of the Audit Committee held on July 13, 2021, for information.

ATTACHMENTS

1. Audit Committee Minutes - July 13, 2021

DATE: Tuesday, July 13, 2021   Meeting No. 02-2021

TIME: 11:00 A.M.

LOCATION: VIA MS TEAMS

VICE-CHAIR: Councillor C. Fraser

MEMBERS:
Councillor M. Bentz
Councillor S. Ch'ng
Councillor C. Fraser, Vice-Chair
J. Friday, Chair
D. Heath

AUDITORS:
D. Kubinec, BDO Canada LLP
A. Berezowski, BDO Canada LLP
K. Spithoff, BDO Canada LLP

OFFICIALS:
N. Gale, City Manager
L. Evans, General Manager – Corporate Services and Long Term Care, and City Treasurer
E. Westover, Director – Financial Services
D. Crupi, Manager - Internal Audit and Continuous Improvement
L. Paradis, Manager - Accounting
T. Malmborg, Administrative Clerk - Corporate Services and Long Term Care Administration Office
J. Tyson, Internal Audit & Continuous Improvement Analyst

1.0   WELCOME AND DISCLOSURE OF INTEREST

Vice-Chair called the meeting to order at 11:00 am.

There were no disclosures of interest declared at this time.

2.0   AGENDA APPROVAL

MOVED BY: Councillor S. Ch'ng
SECONDED BY: D. Heath

WITH RESPECT to the July 13, 2021 meeting of the Audit Committee, we recommend that the agenda as printed, including any additional information and new business, be confirmed.

CARRIED

3.0   MINUTES OF PREVIOUS MEETING

Minutes of Meeting No. 01-2021 of the Audit Committee, held on May 20, 2021, to be confirmed.

> MOVED BY: D. Heath
> SECONDED BY: Councillor M. Bentz
>
> THAT the Minutes of Meeting No. 01-2021 of the Audit Committee, held on May 20, 2021, be confirmed.
>
> CARRIED

4.0   BUSINESS ARISING FROM PREVIOUS MINUTES

ADMINISTRATION UPDATE ON BUSINESS IPROVEMENT AREA OPERATIONS

N. Gale, City Manager, provided a verbal update and responded to questions, relative to the above noted.

5.0   2020 AUDIT COMMITTEE ANNUAL REPORT

Draft Corporate Report No. R95/2021 (Internal Audit & Continuous Improvement) – 2020 Audit Committee Annual Report (with Attachments A & C), for presentation to Committee of the Whole on July 26, 2021, provided for information.

D. Crupi, Manager - Internal Audit & Continuous Improvement, provided a verbal update and responded to questions relative to the above noted.

6.0   2020 CREDIT CARD COMPLIANCE INTERNAL AUDIT REPORT

Copies of the 2020 Credit Card Compliance Internal Audit Report, were provided for information.

D. Crupi, Manager – Internal Audit & Continuous Improvement, provided an overview and responded to questions relative to the above noted.

The following resolution was presented to the Audit Committee for their consideration:

> MOVED BY: D. Heath
> SECONDED BY: Councillor S. Ch'ng
>
> THAT the Credit Card Audit Report, as presented at the July 13, 2021 meeting of the Audit Committee, be accepted.
>
> CARRIED

7.0 INTERNAL AUDIT – CONFIRMATION OF INDEPENDENCE MEMO

Copies of the Memorandum from D. Crupi, Manager – Internal Audit & Continuous Improvement, to the Audit Committee, City of Thunder Bay, dated June 01, 2021, relative to confirming organizational independence of internal audit activity, for information.

Manager Crupi provided an overview and responded to questions relative to the above noted.

8.0 SEGREGATION OF DUTIES AUDIT REPORT

Copies of the Segregation of Duties Audit Report provided by D. Crupi, Manager – Internal Audit and Continuous Improvement, to the Audit Committee, Thunder Bay, dated June 2021.

Manager Crupi provided an overview and responded to questions relative to the above noted.

The following resolution was presented to the Audit Committee for their consideration:

MOVED BY: Councillor S. Ch'ng
SECONDED BY: Councillor M. Bentz

THAT the Segregation of Duties Audit Report, as presented at the July 13, 2021 meeting of the Audit Committee, be accepted.

CARRIED

9.0 BDO's FINAL REPORT TO THE AUDIT COMMITTEE

Copies of Final Report to the Audit Committee, dated June 2021, relative to the results of the BDO audit of the consolidated financial statements of The Corporation of the City of Thunder Bay for the year ended December 31, 2020, for information.

D. Kubinec, Partner, BDO Canada LLP, provide an overview and responded to questions relative to the above noted. Acknowledgement was provided, especially during COVID-19, to BDO staff and City of Thunder Bay management, for all the assistance provided with the audit efforts.

10.0 AUDITED CONSOLIDATED FINANCIAL STATEMENTS

Draft "Treasurer's Report, Year Ended December 31, 2020" (distributed separately), that include "The Corporation of the City of Thunder Bay: Supporting Documentation for the Consolidated Financial Statements, Year Ended December 31, 2020", and Trust Fund Financial Statements, Year Ended December 31, 2020, provided for information.

E. Westover, Director - Financial Services, and L. Paradis, Manager - Accounting, provided an overview of the draft Audited Consolidated Financial Statements and responded to questions.

The following resolution was presented to the Audit Committee for consideration.

>   MOVED BY: Councillor S. Ch'ng
>   SECONDED BY: D. Heath

THAT the Treasurer's Report, Year Ended December 31, 2020, that includes The Corporation of the City of Thunder Bay: Consolidated Financial Statements, Year Ended December 31, 2020, and the Corporation of the City of Thunder Bay: Trust Fund Financial Statements, Year Ended December 31, 2020, as presented at the July 13, 2021 meeting of the Audit Committee, be accepted for presentation to Committee of the Whole;

AND THAT the Audit Committee recommends to City Council, approval of the Consolidated Financial Statements and the Trust Funds Statements for the year ended December 31, 2020.

>   CARRIED

11.0   EXTERNAL AUDITOR REPORT

Auditors D. Kubinec, A. Berezowski, and K. Spithoff declared a conflict and left the meeting at 12:30 pm.

Deliverables for the Audit Committee, as set out in the Committee's Terms of Reference, include the following:

External Auditors Oversight

   a) Recommend to Council the appointment or reappointment of external auditors for the City.
   b) Review and approve the terms of the audit engagement, anticipated fees, scope of the audit and any non-audit services provided.

Further to the review of proposals received for external audit services, the RFP Auditor Selection Committee made their recommendation to the Audit Committee.

Draft Copies of Corporate Report No. **96/2021** (Corporate Services & Long Term Care - Financial Services) - Appointment of Municipal Auditors, for information. (Distributed separately to Audit Committee Members and Officials only)

E. Westover, Director Financial Services, reviewed the decision made by the Selection Committee and responded to questions.

The following resolution was presented to the Audit Committee for their consideration:

>   MOVED BY: Councillor S. Ch'ng
>   SECONDED BY: D. Heath

THAT the Audit Committee recommends to City Council that the firm recommended in R96/2021, be appointed as auditors for the City of Thunder Bay and its outside boards and

agencies, for a five-year period, effective January 1, 2021, and commencing with the completion of the December 31, 2021 year-end, under the terms and conditions as stated in the Proposal.

CARRIED

12.0   NEW BUSINESS

None

13.0   NEXT MEETING

The next meeting of the Audit Committee to be determined in the fall of 2021.

14.0   ADJOURNMENT

The meeting adjourned at 12:45 pm.

MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Official Recognition Committee Minutes

SUMMARY

Minutes of Meeting 05-2021 of the Official Recognition Committee Citizens of Exceptional Achievement held on November 9, 2021, for information.

ATTACHMENTS

1. Official Recognition Committee Minutes - November 9, 2021

DATE: November 9, 2021   **MEETING NO. 05-2021**

TIME: 1:35 p.m.

PLACE: via MS Teams

CHAIR: Allison Hill

PRESENT:	OFFICIALS:
Councillor Peng You	Dana Earle, Deputy City Clerk
Allison Hill	Tina Larocque, Coordinator – Boards,
Ollie Sawchuk	Committees and Special Projects
Samantha Martin-Bird	

1.0 DISCLOSURES OF INTEREST

There were no disclosures of interest declared at this time.

2.0 AGENDA APPROVAL

MOVED BY: Ollie Sawchuk
SECONDED BY: Samantha Martin-Bird

WITH RESPECT to the November 9, 2021 Official Recognition Committee meeting, we recommend that the agenda as printed, including any additional information and new business, be confirmed.

CARRIED

3.0 MINUTES OF PREVIOUS MEETING

The Minutes of Meeting No. 04-2021 of the Official Recognition Committee held on June 15, 2021 to be confirmed.

MOVED BY: Ollie Sawchuk
SECONDED BY: Councillor Peng You

THAT the Minutes of Meeting No. 04-2021 of the Official Recognition Committee held on June 15, 2021, be confirmed.

CARRIED

4.0   CITIZENS OF OUTSTANDING ACHIEVEMENT MONTHLY AWARDS

4.1 Current Nominations

At the request of the Chair, a previous monthly award nomination that was presented at the February 23, 2021 Committee meeting, that was declined as the nomination did not fit the criteria for monthly awards, was re-presented. Since that time, the ORC programme has been reviewed and the criteria for monthly awards has been revised.

A monthly nomination received November 19, 2020, relative to a former resident who gives back to Thunder Bay, was re-presented.

The Committee discussed this nomination and it was consensus of the Committee that this nomination be reviewed at the next meeting to allow members more time to evaluate the nomination.

4.2   New Nominations

A nomination was brought forward relative to a Thunder Bay group that shows great leadership in the community on climate change awareness. The Committee reviewed the nomination and it was consensus of the Committee to approve the nomination. The office of the city clerk will contact the nominee and coordinate the presentation before City Council.

A Chronicle Journal article was brought forward relative to a Thunder Bay Diver. The Committee discussed the article and it was consensus of the Committee that Councillor Peng You will contact a nominator and seek additional information to be presented at a future meeting.

A CBC News Article was brought forward relative to a co-leader of a Felt Project. The Committee discussed the article and it was consensus of the Committee that Samantha will contact a nominator and seek additional information to be presented at a future meeting.

A Superior morning show clip was brought forward relative to one of the organizers of the sacred fire in Thunder Bay. She organized the fire and moved it throughout the City to bring healing and wellness. It was consensus of the Committee that Samantha will contact a nominator and seek additional information to be presented at a future meeting.

A CBC News Article was brought forward relative to a resident who has been opening up her home to help others in the community to provide a place for someone to detox. She provides safe space, warm meal and observation in case medical intervention is required. The Committee discussed the nomination and it was consensus of the Committee that they required further information. It was consensus of the Committee that Allison will contact a nominator and seek additional information to be presented at a future meeting.

5.0   2021/2022 ANNUAL CITIZENS OF EXCEPTIONAL ACHIEVEMENT AWARDS

The Chair read a thank you letter to the Committee for their work on the previous Awards Ceremony.

The Committee discussed the upcoming Annual Awards to be held during the week of National Volunteer week, on Tuesday, April 19, 2022. It was consensus of the Committee that the mailing list of organizations be sent to the Committee to review and suggest any updates that are required. The Office of the City Clerk will mail nomination packages to all organizations, with the nomination period to end on Monday, January 31, 2022.

6.0   NEXT MEETING

The next meeting will be held in December 2021. The date to be determined.

7.0   ADJOURNMENT

The meeting adjourned at 2:12 p.m.

MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Corporate Digital Strategy

SUMMARY

At the November 22, 2021 Committee of the Whole meeting, Report R 160/2021 (Corporate Services & Long-Term Care – Corporate Information Technology) was introduced as a 'first report' to allow Committee of the Whole and the general public time to consider the implications of the report before the recommendations are considered by Committee of the Whole on December 20, 2021.

Report R 160/2021 (Corporate Services & Long Term Care - Corporate Information Technology) recommending that the Corporate Digital Strategy as outlined in Attachment A be approved in principle to guide the future direction and investment in information technology, digital transformation & modernization of service delivery, re-presented.

Memorandum from Manager - Corporate Information Technology Jack Avella dated December 8, 2021 relative to the above noted, for information.

RECOMMENDATION

WITH RESPECT to R 160/2021 (Corporate Services & Long-Term Care – Corporate Information Technology), we endorse the Corporate Digital Strategy as outlined in Attachment A to guide future direction and investment in information technology, digital transformation & modernization of service delivery;

AND THAT Administration include the financial impacts of this work in annual Operating and Capital Budgets for Council consideration in future budget submissions;

AND THAT Administration report back to Council annually on the progress of the Digital Strategy implementation & associated work plan items;

AND THAT any necessary by-laws be presented to Council for ratification.

ATTACHMENTS

1. R 160/2021 (Corporate Services & Long Term Care - Corporate Information Technology)
2. Attachment A – Corporate Digital Strategy – Final Report
3. Memo - J. Avella – Corporate Digital Strategy - Additional Information

Corporate Report

DEPARTMENT/ DIVISION	Corporate Services & Long Term Care - Corporate Information Technology	REPORT NO.	R 160/2021
DATE PREPARED	11/05/2021	FILE NO.	
MEETING DATE	11/22/2021		
SUBJECT	Corporate Digital Strategy		

RECOMMENDATION

WITH RESPECT to R 160/2021 (Corporate Services & Long-Term Care – Corporate Information Technology), we endorse the Corporate Digital Strategy as outlined in Attachment A to guide future direction and investment in information technology, digital transformation & modernization of service delivery;

AND THAT Administration include the financial impacts of this work in annual Operating and Capital Budgets for Council consideration in future budget submissions;

AND THAT Administration report back to Council annually on the progress of the Digital Strategy implementation & associated work plan items;

AND THAT any necessary by-laws be presented to Council for ratification.

LINK TO STRATEGIC PLAN

The City of Thunder Bay's "One City, Growing Together" 2019 – 2022 Strategic Plan details a vision of the City that will act to Lead, Serve, Grow, and Renew. The Digital Strategy supports these goals particularly as it relates to advancing service excellence through a citizen focus and best use of technology.

Serve: Goal 3. Review points of contact with customers to identify better ways of serving the public that are inclusive and easy to use.

The Digital Strategy identifies a number of digital service delivery enhancements, which directly support this goal.

EXECUTIVE SUMMARY

This report is recommending endorsement of the proposed Digital Strategy. The development of a comprehensive Digital Strategy that aligns with the City's Strategic Plan was a

recommendation of the Grant Thornton Program and Services Review (Phase 2) completed in 2020.

The Digital Strategy includes a framework & roadmap for moving Information Technology (IT) & Digital Transformation initiatives forward. Outlined in the Digital Strategy are a number of recommendations, work streams and supporting programs which, when combined, foster and support digital transformation for city services. The proposed Strategy includes a phased approach to implementation and identifies a number of resource requirements that will be required to achieve desired outcomes.

In order to be able to provide efficient end-to-end digital services to our citizens, there are a number of core business processes that must first be digitized. The Digital Strategy identifies work streams to address both areas and where possible, initiatives that focus on digital service delivery and core process digitization will be actioned in parallel through the phased implementation of the strategy.

DISCUSSION

Digital Strategy - Vision & Goal

The Digital Strategy sets a vision for digitally enabled city services through a collaborative approach to delivering customer-centred, digitally powered City services. The City will take a Digital First approach to service delivery when designing new services and re-designing existing services while continuing to provide for traditional channels of service delivery of which citizens have become accustomed.

The goal of Digital Strategy is to provide the required framework to capitalize on opportunities to drive efficiencies throughout the organization, to increase staff productivity, and to gain insights into service delivery that will pinpoint areas for improvement. Perhaps more importantly, the Digital Strategy strives to better position the City to meet ever-growing customer expectations of high quality self-serve digital service offerings.

Digital Context

In 2021, over 94% of Canadians are on the internet, 88% of Canadians bank online, 71% of seniors are online, and in 2019 – pre-pandemic – 72% of Canadians had accessed a government program or service online in the previous 12 months. For many, technology has become an essential way of getting things done – relying on their smartphone or laptop to book appointments or a trip, to make an insurance claim, to bank, shop, navigate, or connect with friends. Increasingly, people want to interact with their government service providers in the same way that they make purchases or deal with their bank.

Today, technology underpins many of the critical things that the City does – from bus route planning, to treating and delivering clean water, to dispatching fire trucks and medical record management at Pioneer Ridge, to tracking and dealing with problems in the roadway.

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The City has made some positive progress in the digital space including a new website, Get Involved Thunder Bay, the Open Data Portal and some online services such as online program registration and online burn permits. There is strong uptake of these online services which is a clear signal that citizens have a desire to interact with the City online.

The Programs and Services Review (PSR) highlighted various opportunities to leverage Information Technology and recommended the development of this Digital Strategy. There are many areas where paper-based processes continue to be used, and few City services are available in the ways that many of the City's customers would like to interact with them – online.

Digital Strategy Development – Methodology & Engagement

Perry Group Consulting, a specialist in municipal technology and digital strategic planning was hired in April 2021 via an RFP process to facilitate the development of this Digital Strategy. The project was overseen by a Digital Strategy Steering Committee comprised of EMT members and the Manager – Corporate Information Technology.

The Project was tackled in four phases:

1. Kick-off and engagement planning
2. Digital maturity assessment
3. Strategy definition
4. Digital strategic plan development

In addition to a staff survey, more than 30 different sessions and roundtables took place which included all Divisional Management Teams within each Department. A workshop was held with all members of the Corporate Information Technology Division and one-on-one sessions were held with each of the General Managers and the City Manager. Sessions took place with the Community Communications Committee, the Accessibility Advisory Committee, members of City Council and a number of other stakeholders including:

> The Community Economic Development Commission (CEDC)
> The Thunder Bay Chamber of Commerce
> Thunder Bay Public Library
> Tbaytel
> Synergy North
> Thunder Bay Police
> Representatives from the building and construction community

Public Engagement was facilitated through the Get Involved Thunder Bay platform and included a public survey, an idea board, a virtual focus group session and a video to explain and provide information about digitally enabled communities.

Together with background information and documents collected by the Perry Group, information gathered from each of these sessions, roundtables, surveys and meetings has informed each phase of the project from Digital Maturity Assessment, Gap and Future State Analysis to Defining the Strategy and was instrumental in the development of the Digital Strategy.

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<u>Key Strategy Components and Recommendations</u>

The Digital Strategy identifies five work streams for the City to focus on. The five work streams are:

1. **Digital Workplace** – Connecting all staff; using technology to make staff working lives simpler and easier.

2. **Digitized Business Processes** – Replacing paper-based, manual processes with automated, digital, real-time workflow-based processes.

3. **Digital Infrastructure** – Ensuring the City has the connectivity, Cloud capabilities and cybersecurity to support the City and its community.

4. **GIS Data & Analytics** – Managing data well and using it to drive City practices and decision-making.

5. **Digital Services** – Providing great, self-service digital experiences to customers over visits or calls to City Hall.

In support of these work streams are a set of major projects, <u>some of which include</u>:

- Implementation of Microsoft 365, a modernized collaboration environment for staff and for working with partners.
- An Information and Records Management Strategy and new systems.
- Increased support for mobile working and flexible working (including new device types, expanded hours of support).
- A revamp of the City's Asset Management systems.
- SAP upgrades and implementation of Finance improvements.
- Implementation of a comprehensive HR Management System.
- Water and Tax Billing System replacements, including online customer portals.
- Network improvements and long-term strategy to support Internet of Things (IoT) and Smart City.
- Public Wi-Fi expansion.
- GIS upgrades and expanded self-service GIS capabilities for customers and staff.
- Data Strategy, platform and new reporting and analytics.
- Major expansion of online payment options.
- Forms digitization program – converting PDF and Word forms into online fillable forms available from any device.
- Implementation of online building permitting and planning services, including providing mobile technology for inspectors.

In addition to the recommended work streams and major initiatives, the Digital Strategy makes a number of recommendations intended to build the supporting framework for execution of the Digital Strategy and guide Digital and Information Technology Initiatives. The supporting framework consists of the following programs:

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1. Digital Governance: establishing suitable groups and processes for overseeing the delivery of the digital program

2. Digital Operating Model: resourcing the teams, assigning roles and responsibilities and establishing a suitable delivery model to successfully execute the Digital Strategy

3. Digital Culture: growing the City's digital savviness and digital Literacy – building capacity to become more digital as an organization

Specifically, the Digital Strategy makes the following recommendations related to Digital Governance, Digital Operating Model and Digital Culture:

1. Adopt and communicate corporate-wide a clear strategic intent and vision for digital service delivery as the City's primary platform for customer service – a collaborative approach to delivering customer-centred, digitally-powered City services.

2. Ensure that all service owners commit to moving toward Digital First service as a priority through the signing of a Digital Declaration.

3. Set up and operate the recommended Information, Technology and Digital Governance model to help keep the organization focused on strategic priorities, to enable shared learning, and collaborative working on the technology and digital portfolio. This includes:

    a. Establishing a corporate Information Digital and Technology Governance team, to be led by EMT and CIT Management, and to ensure sufficient time and attention can be paid by leadership to strategic technology and digital opportunities.

    b. Establishing coordinating groups as the forum for collaboration in key areas of Strategy focus – work and assets, land and property, customer service and digital, GIS and data.

    c. Establishing a singular intake process for technology initiatives that applies suitable levels of rigor, ROI assessments and architecture to ideas, concepts and project proposals.

    d. Conduct an IT policies review and expand the City's IT policy framework to address important areas.

4. Set up and operate the proposed IT and digital operating model to support the delivery of this Strategy and new digitally-powered services. This includes:

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a. Elevating the CIT function and pursuing a centralized approach to core technology staffing.

b. Formalizing a revised mandate for CIT along with formalizing roles and responsibilities between CIT and departmental staff (as recommended in this Strategy).

c. Reviewing and elevating CIT Manager and Supervisor roles in line with the City's guidelines for Organizational Job Level titles.

d. Increasing investment in IT staffing, with recommendations to add the following positions in a phased approach over the next 4 years:

- Manager, Delivery
- GIS and Data Coordinator
- Project Manager / Business Analyst (x3)
- Application Developer / Analyst (x2)
- Data Engineer

e. Working on building stronger IT / business unit relationships through a new CIT run relationship management function.

f. Adopting a consistent project management methodology and improve project delivery capabilities and project outcomes.

g. Increasing focus on architecture.

h. Pursuing alternate resourcing strategies (including capitally-funded staffing, using rosters and increasing use of out-tasking) to add additional capacity to CIT to support the delivery of digital solutions.

5. Reviewing IT funding and increasing IT investment.

a. Review current approach to IT investment and determine a suitable go-forward model that provides the insights and controls necessary over the City's total technology spend.

b. Fund projects for 2022 through existing budget commitments and submit 2023 budget requests to support implementation of the next stages of the Strategy.

c. Establish new sources of funding to support increased technology investment, targeting a 3% investment level (capital and operating) at minimum.

d. Capitally-fund staffing and backfill for technology projects.

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     e. Begin to prepare for capital to operating transition associated with a move to subscription and Cloud services.

6. Investing in digital change management, education, and culture change through showcasing successes, bringing in external speakers, building Communities of Practice.

7. Measuring and reporting on digital performance and successes.

     a. Establish a Digital Strategy performance dashboard, reporting on key metrics defined in this Strategy.

     b. Provide an annual report to Council and EMT on progress against the Digital Strategy.

Phased Implementation & Digital Services

The Strategy envisions three discrete stages to putting the City on the path to becoming a more digital organization. The three stages are:

Phase 1 - Setting Up for Success – 2021-2022

During this stage, the City will be:

- Establishing the new governance model.
- Readying for the 2022 budget process.
- Designing new intake processes.
- Applying project management best practices.
- Establishing the new IT organization structure, and integrating team members.

This is a period of transition where projects will continue to be delivered, but where the focus will be on building out *how* things are being done – the right way.

Phase 2 - Digitizing Core Processes – 2022-2025

During this stage, the governance processes and new organization will be put in place and the engine of delivery will begin to develop.

Project capacity and delivery will begin to ramp up and a number of the significant enterprise business systems projects will be underway.

The work here is the core focus of the Strategy – digitizing core processes around people and money, assets and work, land and property and collaboration and information management.

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<u>Phase 3 - Digital Service Acceleration – 2023-2025</u>

During this phase, as the City builds out digitized foundations, it will be able to begin to launch new complete digital services for citizens including online permitting and licensing, online payments, additional facility and program bookings and online tax and water billing with customer portals for account management.

Accelerating the implementation of citizen facing digital service delivery is clearly a priority in Phase 3 but it should be noted that a number of digital service offerings will be made available during Phase 1 and Phase 2. This is illustrated in section 8.1.3 (Digital Service Acceleration: 2023-2025+) of Attachment A – Proposed Digital Strategy.

FINANCIAL IMPLICATION

Endorsing the Digital Strategy results in no immediate financial implications. The City was successful in seeking provincial support and funding ($125,000) for the development of the Digital Strategy through the Audit and Accountability Fund.

Costs associated with projects identified in the five work streams (Appendix D of Attachment A) are order of magnitude estimates for some of the projects. Cost estimates will need to be further refined as the scope and resource requirements for each project related to the Digital Strategy is reviewed.

The implementation of the identified projects will follow a multi-year phased approach. Operating, Capital (including staffing expansions) related to advancing the Digital Strategy will be identified and requested through the annual budget process for Council consideration.

As suggested in the Digital Strategy, Administration will explore a range of alternative funding sources and if viable, bring them forward for consideration.

CONCLUSION

It is concluded that the Digital Strategy as outlined in Attachment A should be endorsed and that administration report back to council annually on the progress of the Digital Strategy implementation & associated work plan items.

BACKGROUND

On June 22, 2020, Committee of the Whole received Corporate Report No. R 79/2020 providing the Grant Thornton Phase Two Report. At that meeting, Committee passed a motion that directed administration to provide a report that offers an assessment of the recommendations that provides information on the financial impacts, associated timelines and the greatest value to residents, and information about potential implementation opportunities in the following areas:

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- IT Modernization
- Human Resources & Corporate Safety
- Enhanced customer service initiatives • Operational efficiencies
- Community partnerships
- Facilities rationalization
- Minimizing competition with existing private sector and non-profit organizations
- Service level reductions/enhancements
- Enhanced revenue generating opportunities
- Cost recovery policies for municipal programs, services and facilities

The Program and Service Review identified a number of recommendations related to use of Information Technology (IT) and the role of IT in transforming how both internal and external services could be more efficiently delivered.

The need to develop a Digital Strategy was specifically recommended in the following recommendation from the Program and Services Review:

> "The City should develop a comprehensive Digital Strategy that is connected to the overall City Strategic Plan and its objectives. The Digital Strategy should encompass all aspects of Information Technology in the City including use of technology, data handling and data security, schedule for updates, best practices on how to choose technology software, when and where to involve the CIT team on general and division level projects. The parameters of where CIT can help divisions and which areas divisions need to resource themselves should be outlined."

The development of a Digital Strategy was recommended by administration in Corporate Report 144/2020 (City of Thunder Bay Program and Service Review – Implementation) presented at a special Committee of the Whole meeting on December 9, 2020 and approved by Committee.

In January of 2021, a Request for Proposal was issued for consulting services related to the development of a Digital Strategy. The Perry Group Consulting was selected through that process. The review and Strategy work completed by the Perry Group Consulting is being funding through Administration's successful application to the Audit and Accountability Fund – Intake #2.

REFERENCE MATERIAL ATTACHED

Attachment A – Proposed Corporate Digital Strategy

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PREPARED BY: JACK AVELLA, MANAGER – CORPORATE INFORMATION TECHNOLOGY

THIS REPORT SIGNED AND VERIFIED BY:	DATE:
Linda Evans, GM Corporate Services & Long Term Care, City Treasurer	November 8, 2021

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Corporate Digital Strategy

A Collaborative Approach to Delivering Customer-Centred, Digitally-Powered City Services

Final Report

October 25, 2021

Table of Contents

Version Control

Table 1: Version Control

Version	Prepared By	For	Date	Comments
0.1	Ben Perry	Internal	2021-09-22	First early draft
0.2	Ben Perry	EMT	2021-10-04	First draft for EMT
0.3	Ben Perry	EMT	2021-10-25	Incorporates EMT feedback
1.0	Ben Perry	Council	2021-11-04	Incorporates further EMT feedback

Key Terms and Terminology

We have worked hard to prepare this document using easy-to-understand language. Nonetheless, the meanings of some frequently used terms should be clarified before we start.

Table 2: Key Terms and Terminology

Customer	This term has been used throughout this document as a shorthand to refer to users of the City's technology and digital services which includes residents, businesses, visitors, Mayor and Council, the workforce, and partners.
Experience	Refers to the overall experience of a person using a City service, especially in terms of how easy or pleasing it is to use.
Digital	Refers to a mode of operating and delivering City services in a way that takes full advantage of streamlined processes and modern technologies (web, app, social, mobile, data) to deliver improved experiences, business efficiencies and insights.
Digital First	Refers to designing City services for digital and online service channels *before* counter, phone, or mail-based channels. For example, designing a new service to use a web form and online payment, not a paper form and a need to visit City Hall to pay.
Digitization	The automation of manual and paper-based processes, enabled by the digitization of information, workflows, moving from an analog process to a computerized process.
CIT	Corporate Information Technology – the City of Thunder Bay's IT Division.

Included in Appendix A, Glossary Of Terms is a complete list acronyms used throughout this document.

Executive Summary

The Digital Context and Opportunity

In 2021, over 94% of Canadians are on the internet, 88% of Canadians bank online, 71% of seniors are online, and in 2019 – pre-pandemic – 72% of Canadians had accessed a government program or service online in the previous 12 months.

For many, technology has become an essential way of getting things done – relying on their smartphone or laptop to book appointments or a trip, to make an insurance claim, to bank, shop, navigate, or connect with friends.

Increasingly, people want to interact with their government service providers in the same way that they make purchases or deal with their bank. In 2019, 68% of Canadians indicated a preference to access government services online. Think about your own recent interactions with ServiceOntario to renew a driving license or submit your tax return to the CRA and how much easier these processes are now that you can do them online.

In Thunder Bay, some positive progress is being made in the right direction – a new website, get involved Thunder Bay, online program registration, and open data have all been recently introduced. And these new services have seen high rates of uptake – with 80% of customers getting burn permits online, and over 70% of recent recreation program registrations happening online. These are strong signals from the community of a desire to interact with the City online. As part of the development of this Strategy, consultation with the community, the Thunder Bay Chamber of Commerce, and representatives from industry, strongly reinforced the message that demand is high for online services.

Today, technology underpins many of the critical things that the City does – from bus route planning and making sure buses are on time, to treating and delivering clean water, to dispatching fire trucks and medical record management at Pioneer Ridge, to tracking and dealing with problems in the roadway.

But there are many areas where paper-based processes continue to be used, and few City services are available in the ways that many of the City's customers would like to interact with them – online.

The Program and Service Review (PSR) highlighted various opportunities to leverage technology and recommended the development of this Digital Strategy. The City was successful in seeking provincial support and funding for the project through the Audit and Accountability Fund.

Perry Group Consulting, a specialist in municipal technology and digital strategic planning, was hired in April 2021 via an RFP process to facilitate the development of this Strategy.

Current State

Following broad consultation with Council, community and staff at the City, the consulting team's current state assessment confirmed many of the PSR's observations and identified a set of key opportunities for improvement.

The City appears to be behind peers – such as Cambridge, Kingston, Guelph, Milton, Waterloo, Chatham-Kent, Newmarket, and Red Deer, and leaders in technology such as Oakville, Burlington, Kitchener, Richmond Hill, Markham, and Calgary – in taking advantage of technology and digital capabilities to deliver efficient and effective City services. There is some significant catch up required.

Major systems that the City has invested in, such as SAP, AMANDA and Hansen (which are, in many ways, market leading solutions used widely by many other municipalities in Canada) are under-utilized, and core processes that run the City are not yet digitized.

There are numerous opportunities to deliver new services online to customers – billing and account management for water and tax, payments, bookings, forms, permits and licenses, report a problem, make a request, as well as marina and campgrounds booking and self-service.

The operating model for IT at the City (how technology is designed, delivered, and managed) is somewhat unclear and undefined – a finding also identified in the Program and Service Review. This contributes to a complex and siloed environment where various teams are pulling in different directions.

There is a lack of formalized technology governance, which means that the City's technology investments and program delivery lack the coordination necessary to be as effective as possible, and to optimize the use of funds and efforts.

The City does not have an effective "engine of project delivery" – a shared and consistent methodology and a dedicated team of staff who are skilled at repeatedly and successfully delivering technology initiatives. This results in too many long-running technology projects that don't always achieve the expected outcomes. This is a core competency that the City will need for technology projects ahead.

Also, the City needs to do a better job of evaluating solutions for "fit" with the City's existing technology estate – this is the role of IT architecture – to which the City currently has no resources assigned.

When benchmarked against other Ontario municipalities, Thunder Bay's investment in IT staff is significantly lower than comparable peers, and the consulting team noted that the City's CIT team in 2021 is the same size as it was in 2001. In those 20 years, the importance and impact of IT on the organization has been transformed.

The assessment of the City's digital maturity scores the City at only 2 out of 5 for its digital maturity, although the City shows some characteristics of a Digital Resister which would rate the City at a Level 1 – illustrating there is much ground to make up to become a more digital organization.

The consulting team notes that there are opportunities in every part of the organization to apply process design and automation to improve the efficiency of service delivery, to increase productivity, and to improve the customer experience.

The Vision

Looking to the future, the Digital Strategy sets a vision for digitally-enabled City services. The Vision for the Digital Strategy is articulated in the following statement:

A collaborative approach to delivering customer-centred, digitally-powered City services.

The Strategy recommends that the City begin to take a Digital First approach to service delivery, working on designing all new services – and re-designing existing services – to be delivered digitally.

Rather than from the City's perspective, services should be designed from the customer's perspective and around their needs, making the service easy to interact with.

The Strategy makes the case for the importance of collaboration and recommends a new governance model and the use of multi-disciplinary teams to bring the right perspectives and approach to digital implementation.

While the Strategy promotes digital service offerings, the City must also recognize that many customers, for various reasons, will not want to (or will not be able to) use online services. These customers will prefer to talk to staff directly on the phone or face-to-face.

This Digital Strategy does *not* recommend digital-only services. All services should continue to be offered to customers across all channels and in the ways that customers want to interact with the City.

Major Areas of Focus

The Strategy identifies five work streams for the City to focus on. They include:

1. **Digital Workplace** – Connecting all staff; using technology to make staff working lives simpler and easier.

2. **Digitized Business Processes** – Replacing paper-based, manual processes with automated, digital, real-time workflow-based processes.

3. **Digital Infrastructure** – Ensuring the City has the connectivity, Cloud capabilities and cybersecurity to support the City and its community.

4. **GIS Data & Analytics** – Managing data well and using it to drive City practices and decision-making.

5. **Digital Services** – Providing great, self-serve digital experiences to customers over visits or calls to City Hall.

In support of these work streams are a set of major projects, including:

- Implementation of Microsoft 365, a modernized collaboration environment for staff and for working with partners.

- An Information and Records Management Strategy and new systems to support improved access to and sharing of information.

- Increased support for mobile working and flexible working (including new device types, expanded hours of IT support).

- A revamp of the City's Asset Management systems.

- SAP upgrades and implementation of Finance improvements to enable self-service and reduction of administrative tasks.

- Implementation of a comprehensive HR Management System.

- Water and Tax Billing System replacements, including an online customer portal.

- Network improvements and long-term strategy to support Internet of Things (IoT) and Smart City.

- Public Wi-Fi expansion.

- An expanded cybersecurity program.

- GIS upgrades and expanded self-service GIS capabilities for customers and staff.

- Data strategy, platform and new reporting and analytics.

- Major expansion of online payment options.

- Forms digitization program – converting PDF and Word forms into online fillable forms available from any device, that enable digital processing, approvals and signatures and payments.

- Implementation of online building permitting and planning services, including providing mobile technology for inspectors.

- Expansion of online bookings and account management for recreation programs, facility booking, marina and campground services.

Strategic Plan Support

The work identified in this Strategy directly supports the pillars of the City's Strategic Plan in the following ways.
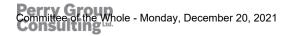
Table 3: Pillars of the City's Strategic Plan

Lead	Serve
- Expanded regional / cross-sector partnerships. - Data, analytics, and community insights. - Expanded public Wi-Fi.	- New digital services, including billing, payments, book, apply, request. - Customer Relationship Management (CRM) Strategy.
Grow	**Renew**
- AMANDA roadmap. - Building and planning enhancements. - Mobile inspections. - Online planning and permitting applications.	- Asset Management systems. - GIS expansion and integration. - Mobile technology. - Project and portfolio management solutions.

Key Recommendations

In addition to the recommended workstreams and key projects, the Strategy makes the following recommendations:

1. Adopt and communicate corporate-wide a clear strategic intent and vision for digital service delivery as the City's primary platform for customer service – a collaborative approach to delivering customer-centred, digitally-powered City services.

2. Ensure that all service owners commit to moving toward Digital First service as a priority through the signing of the [Digital Declaration](#).

3. Set up and operate the recommended Information, Digital and Technology Governance model to help keep the organization focused on strategic priorities, to enable shared learning, and collaborative working on the technology and digital portfolio. This includes:

   a. Establishing a corporate Information, Digital and Technology Governance team, to be led by Executive Management Team (EMT) and CIT Management, to ensure sufficient time and attention can be paid by leadership to strategic technology and digital opportunities.

   b. Establishing Director- and Management-level coordinating groups as the forum for collaboration in key areas of Strategy focus – work and assets, land and property, customer service and digital, GIS and data.

c. Establishing a singular intake process for all technology initiatives that applies suitable levels of rigor, ROI assessments and architecture to ideas, concepts and project proposals.

d. Conduct an IT policies review and expand the City's IT policy framework to address important areas.

4. Set up and operate the proposed IT and digital operating model to support the delivery of this Strategy and new digitally-powered services. This includes:

a. Elevating the CIT function and pursuing a more centralized approach to core technology staffing.

b. Formalizing a revised mandate for CIT along with clearly defining roles and responsibilities between CIT and departmental staff (as recommended in this Strategy).

c. Reviewing and elevating CIT Manager and Supervisor roles in line with the City's guidelines for Organizational Job Level Titles.

d. Increasing investment in IT staffing, with recommendations to add the following positions in a phased approach over the next 4 years:

   ▪ Manager, Delivery

   ▪ GIS and Data Coordinator

   ▪ Project Manager / Business Analyst x 3

   ▪ Application Developer / Analyst x 2

   ▪ Data Engineer

e. Working on building stronger IT / business unit relationships through a new CIT-operated relationship management function.

f. Adopting a consistent project management methodology and improving project delivery capabilities and project outcomes.

g. Increasing focus on architecture.

h. Pursuing alternate resourcing strategies (including capitally-funded staffing, using rosters and increasing use of out-tasking) to add additional capacity to CIT to support the delivery of digital solutions.

5. Reviewing IT funding and increasing IT investment.

a. Reviewing the current approach to IT investment and determining a suitable go-forward model that provides the insights and controls necessary over the City's total technology spend.

b. Funding projects for 2022 through the 2022 proposed budget commitments, and subsequently submitting 2023 budget requests and so on, to support implementation of the next stages of the Strategy.

    c. Establishing new sources of funding to support increased technology investment, targeting a 3% investment level (capital and operating) at minimum.

    d. Capitally-funding staffing and backfill (in business units and CIT) for technology projects.

    e. Beginning to prepare for capital to operating transition associated with a move to subscription and Cloud services.

6. Investing in digital change management, education, and culture change through showcasing successes, bringing in external speakers, building Communities of Practice.

7. Measuring and reporting on digital performance and successes.

    a. Establishing a Digital Strategy performance dashboard, reporting on key metrics defined in this Strategy.

    b. Providing an annual report to Council and EMT on progress against the Digital Strategy.

Implementation Staging

Undoubtedly, there is significant work ahead for the City which can be intimidating. Breaking the work into bite size chunks is important. As such, the Strategy recommends a phased-in approach to implementation.

The first task is to set the conditions for success – by building the governance model, re-setting the operating model and aligning the organizational model appropriately.

Next, the City must focus on fully digitizing its core processes (people and money, work and assets, land and property). This means a focus on business process re-design, business solutions implementations, and the expansion of mobile technology use to field and mobile staff.

The third act is building on these foundations to begin to move City services online such as building and planning services.

Funding the Strategy

The City has established a Digital Strategy Implementation Fund for 2022 and going forward in 2023 it is recommended that a Digital Strategy Fund be established to support the implementation of the Strategy. Funding needs for some of the items identified in this Strategy have already been identified in the long-term capital plan.

The proposed 2022 Digital Strategy Implementation Budget and other sources cover the projects identified for 2022 in this Strategy.

Additional staff recommended in this Strategy have also been included in the proposed 2022 budget.

Future requests for funding to support the implementation of this Strategy will come forward as part of the standard budget process.

Conclusion

While these recommendations undoubtedly require significant investment, effort, and attention, this Strategy is crucial to the long-term effectiveness of the City and should be acted upon.

To capitalize on technology opportunities is a classic invest-to-save situation. Up-front investment results in long-term gains. The returns on investment are there and can be realized with the right approach.

Not acting on the recommendations contained within this Strategy will mean that the City misses out on opportunities to drive efficiencies throughout the organization, to increase staff productivity, and to gain insights into service delivery that will pinpoint areas for improvement.

Perhaps more importantly, the City will be poorly positioned and likely fail to meet ever-growing customer expectations of high-quality service.

To be a digital organization – one that operates effectively in the era of internet and smartphone – is increasingly becoming a core municipal competency.

Municipalities – large and small across the globe – are embracing technology as a way of doing more with less, of operating efficiently and achieving improved outcomes for their communities.

This Strategy positions the City of Thunder Bay to do the same and achieve the same benefits.

1.0 Introduction and Background

1.1 The Context

In the always-on, fast moving, 21st century world, digital technology has become a powerful force in society. Using their smartphones or tablets, many people choose to bank and shop, buy and book, get their entertainment, navigate, connect, and communicate online in ways that fit better into their busy lives than previous ways of getting service did.

Federal, provincial, and municipal governments across the country have recognized these trends and are embracing these concepts and ideas too – implementing new capabilities to deliver digital government services to their customers. Just think about your own experiences with online health card renewals, getting a fishing license, or purchasing your vehicle sticker.

This Strategy was developed in this context, as well as in the shadow of the COVID-19 pandemic. The pandemic experience has been instructive, showing just how willing customers are to interact with the City digitally and helping City leaders and staff learn how fast they can pivot to work from home, introduce digital approvals, and reconfigure services to be more digital.

While the 2019 Grant Thornton Program and Services Review was the impetus to initiate this work, it is in this broader context that the development of this Digital Strategy was identified as a Council priority.

1.2 The Importance of Technology for Municipalities

Today, most municipalities – Thunder Bay notwithstanding – are massively dependent upon technology to operate. In fact, you might be surprised by how much technology runs the City.

Services as diverse as tax billing, dispatching fire trucks and ambulances, coordinating transit services, managing traffic flows, safely treating water, handling customer enquiries, and managing recreation program registration, all rely on information technology working quietly in the background to operate effectively and safely.

While email, messaging and smartphones keep every part of the organization connected, communicating, and collaborating, it is the back-office business solutions that manage the flow of work – allowing managers and staff to track development applications, run payroll, collect taxes, manage customer requests, or monitor budgets. It is this digitized core or digitized platform that makes the City work and work efficiently.

The diagram below is an illustration of how the crux of common systems feeds a multitude of areas – internal and external to the City – 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 Making Connections

Using common, integrated systems ensures that inquiries flow from front counters to the back-office and to appropriate field staff for resolution. This increases the potential to deliver expected results consistently and reliably at reasonable cost.

Without technology, most municipalities simply could not operate, even for short periods.

Beyond back-office systems, municipalities are increasingly employing what are referred to as "Smart City technologies" and more connected City-wide sensors are being used to monitor critical infrastructure (e.g., detect water leaks, highlight congestion, or report a full garbage can) and alert staff to where problems are anticipated or have occurred.

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

So, though often invisible to citizens, technology is a critical service – the glue if you will – that keeps the City running 24/7.

1.3 The Importance of this Digital Strategy

The Program and Service Review noted that *"The City should develop a comprehensive Digital Strategy that is connected to the overall City Strategic Plan and its objectives."*

Given the importance of technology and its role in delivering City 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 City'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?

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

1.4 Developing this Strategy

Council and the EMT identified the need for a Digital Strategy as an outcome of the Grant Thornton Program and Service Review.

The City sought funding from the Province through its Audit and Accountability Fund (AAF), and selected Perry Group Consulting Ltd. (a specialist in municipal technology and Digital Strategy) as a third-party reviewer to facilitate the development of the Strategy via a formal RFP process.

From the outset, the development of this Strategy was approached as an enterprise initiative, not a Corporate Information Technology (CIT) division project.

The EMT – with the Manager of CIT– operated as a Digital Strategy Steering Committee. The consulting team reported to the Steering Committee and the group met nine times to review findings and provide input and direction.

The General Manager (GM) of Corporate Services and Long-Term Care sponsored the project which the Manager of CIT led.

Additionally, IT and business unit staff were engaged for awareness and input throughout the project. These groups participated in a series of workshops and meetings to shape the Strategy and contributed to the Vision and principles. Perry Group facilitated these sessions and the creation of this Strategy.

The project was tackled in four phases.

1.4.1   Kick-Off and Engagement Planning

We conducted a series of kick-off workshops with City Council, Leadership and staff to initiate the project and plan the engagement approach.

1.4.2   Digital Maturity Assessment

A current state assessment was conducted by the consulting team which involved input from all staff via survey, assessments of Thunder Bay technologies and practices against municipal standards, workshops with all IT staff, as well as meetings with CIT Management, all divisions and members of the Executive Leadership team.

The consulting team met with members of Council as well as with the Accessibility and Community Communications Committees. Meetings were also held with partners, including Tbaytel, Police, Library, CEDC and various other community partners. A focus group with representatives from the development and building community was also held.

At the conclusion of this phase, an interim Findings Report was compiled and reviewed with the CIT Management Team, CIT Staff, the Digital Strategy Project Team, and EMT through the Digital Strategy Steering Committee.

1.4.3   1.4.3 Strategy Definition

During the strategize phase, a series of meetings, workshops and roundtables were held with CIT Management, the Digital Strategy Project Team and EMT to set future-looking strategies, develop the Vision, define principles to guide future decisions, determine priorities and set the future operating model.

1.4.4   Digital Strategic Plan

The consulting team worked with the IT Manager, City Manager, GM of Corporate Services and Long-Term Care and the Steering Committee to develop a series of recommendations, an implementation plan and to prepare this final written Strategy, drafts of which were reviewed by the CIT Management Team, Digital Strategy Project Team, EMT and IT staff before being finalized.

A list of participants who contributed to the development of the Digital Strategy is included in Appendix B, Strategy Development Participants.

We thank all those who participated in the process of developing a Strategy that we believe positions the City well for a more digitally-enabled future.

2.0 Current State

All good strategy starts with a good understanding of where you currently stand. It is important to understand the current state before determining where you want to go, to identify gaps, and to help determine what it will take to achieve the desired future state.
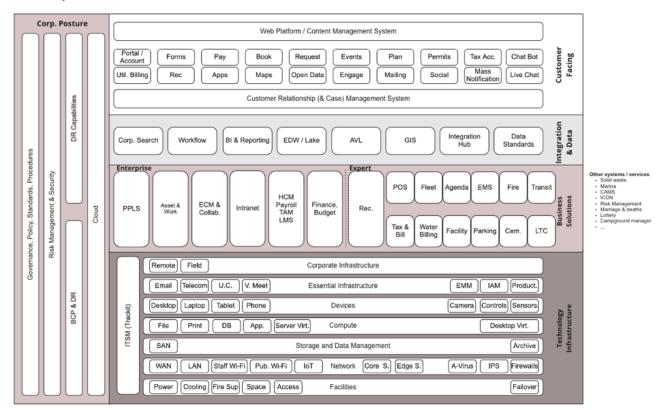
In the second phase of the project, the consulting team conducted a detailed assessment of the current technology and digital environment and the management of these environments. Findings were compiled and then shared and validated by City staff and management.

What follows is a summary of the consulting teams' key observations and findings.

2.1 Introducing the Municipal Technology Model

Perry Group's standardized Municipal Technology Model (MTM), shown below, was the basis for evaluating the City's technology architecture environment.

The diagram shows four interconnected layers. Each entity noted within a layer relies on the other layers for staff to deliver services to internal and external clients.

Each layer is described in detail below.

Figure 2: Municipal Technology Model

This is a generalized, conceptual municipal IT model, developed with Canadian municipalities over the last 10 years. The MTM introduces several key concepts that are important for the City at this time, including:

- There are four main technology layers (labeled as: Infrastructure, Business Solutions, Integration and Data, Customer-Facing). Each requires discrete IT skill sets to be managed effectively. For instance, while technology infrastructure management is deeply technical, project management around business solutions projects requires project experience, change management and soft skills. An organization needs a breadth of skills in various domains to effectively manage the complete environment.

- The Infrastructure Layer is the foundation for the entire technology environment. Infrastructure must be robust, high-performing and dependable because it provides the basis for all other layers. Unreliable or inaccessible infrastructure undermines all the technology that sits above it.

- Appropriate policies, security, data protection and disaster recovery provisions should be in place. In an ideal situation, the IT Team will also need appropriate tools to help manage the environment including: a helpdesk request tracking system, a set of systems management solutions and automation tools (e.g., remote support, patch management, mobile device management) to simplify IT management tasks, increase productivity of IT staff and to enable employee self-service (e.g., password resets).

- A municipality should limit the number of corporate business solutions platforms it runs to reduce process and information silos. These business solutions provide the foundations for automated and streamlined business processes. They will gather data to drive analytics capabilities and underpin the effective delivery of online services.

- Business solutions should be integrated allowing for data to be automatically passed between solutions (using integration technologies), thus reducing data duplication and errors and ensuring auditability.

- Online, customer-facing services should connect / integrate into back-office business solutions, reducing the requirement to re-key information and enabling complete end-to-end digital services.

- The IT architecture should *build from the bottom up* – Infrastructure first, then Business Solutions and so on.

These are some of the basic tenets under which a well-architected technology environment will operate.

2.2 Municipal Technology Model Assessment Results

The figure below illustrates the results of the consultant's assessment of Thunder Bay's technology environment against the MTM.

The traffic light colour coding highlights where the City is in good shape (green) and where work is needed (yellow=some work needed; orange=major work needed; red=risk/replace and clear/white=gap).
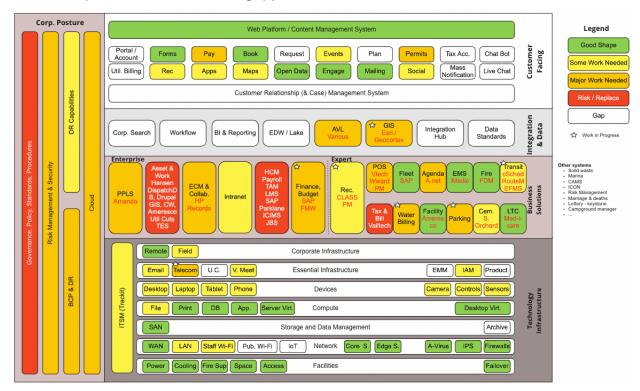

Figure 3: Thunder Bay MTM Assessment Results

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The summary of the observations related to the technology environment is presented in the table below and a grade rating (A, B, C, D, U) is offered to summarize the resulting assessment where A=Good, B=Improve, C=Weak, D=Risk, U is unclassified.

Table 4: Summary of Technology Environment Observations

Good	Improve	Weak	Risk

Layer	Comments	Grade
Customer Facing	• Decent web platform – eSolutions + forms • Few web / digital services – strong customer demand for digital services • No CRM and no unified customer service strategy	C-
Integration	• Limited work in this space currently • Some pockets of GIS work – but lacking coordination; GIS Strategy identifies some major work ahead & importance of GIS leadership • Lots of opportunities – but no resources or attention directed to this domain – who is leading?	U
Business Solutions	• Significant underutilization of major systems – SAP, Hansen, AMANDA • Many business processes are paper driven with post-facto tracking • Lack of strategic direction on key platforms – fracturing / local direction being set • Complex / partnerships / relationships – CIT un-involved in many systems decisions	D
Infrastructure	• CIT domain • Reasonably stable, reliable, infrastructure in decent shape • Network connectivity needs some attention / investment • M365, clarify cloud posture, improve BCP and policy positions, address data lifecycle management	B

While there are several things to address to improve the Infrastructure Layer – not the least of which is network connectivity and network performance – broadly speaking, the core technical infrastructure is in decent shape. Work will be needed in areas such as policy, Cloud Strategy, Governance as well as business continuity, disaster recovery and security.

However, the key message for the City that the assessment reveals is that the City is under-utilizing and under-performing with regard to its business solutions. This is the area on which the City must focus in the coming years – to bring its core processes and core systems up to a reasonable level.

Major systems that the City has invested in – such as SAP, AMANDA and Infor, which are, in many ways, market leading solutions used widely by many other municipalities in Canada – are under-utilized and core back-end processes that run the City are not digitized. Too many of the City's most important processes run in multiple parallel systems or are managed in Excel worksheets.

The next layer – Integration and Data – is very under-developed at this time. This is unsurprising given the situation in the Business Solutions layer.

GIS is the area on which to focus in the short-term because of its importance as a core platform to asset management, and land and property-based processes. In the longer-term, a focus on broader data strategy, analytics and business intelligence is required.

Finally, there are numerous opportunities to deliver new services online to customers – billing and account management for water and tax, payments, bookings,

forms, permits and licenses, report a problem, make a request, as well as marina and campgrounds booking and self-service.

The evidence from our consultation with the community and uptake of newly introduced digital services – for instance, 80% of all burn permits and over 70% of recent recreation registrations are done online – suggests that demand is there for services to be delivered online. But the City must establish its digitized foundations in the Business Solutions Layer before significant progress on digital service delivery can be made.

Following the *build from the bottom up* approach, the City's focus should be on its core business solutions and ensuring its core processes – people and money, land and property, asset and work, and information management – are well managed and fully digitized from end-to-end.

2.3 High-Level Summary of the IT and Digital Management State

As part of the consulting team assessment, we also reviewed the way the organization approaches information, technology, and digital management.

While there are various positives – including a capable team in CIT, some good progress on the City's website, the recent launch of online recreation services, work underway to replace the City's water billing system with a modern portal-based solution – some important issues were identified and are discussed here.

2.3.1 IT Operating Model

We note that the City's IT operating model (how technology is designed, delivered and managed) is somewhat unclear and undefined – a finding also identified in the Program and Service Review.

The role of CIT, as illustrated below, is unclear and interpreted in different ways by different parts of the organization. Some see CIT as a "Utility provider", while others expect CIT to be a "Partner player".

If a "Partner player", CIT would be integral to how the organization does business, to closely partner with business units to help them identify, plan and deliver transformation initiatives. Some, at Thunder Bay, see CIT here.

Contradictorily, however, some see CIT as a "Solid utility" meaning that CIT is expected only to provide cost-effective reliability to the business units.

Some see CIT here → Partner player

IT is integral to how we do business: IT organization is expected to closely partner with business units to help identify, plan and deliver significant business transformation initiatives - plus be a trusted supplier.

Trusted supplier

IT delivers critical functionality and services: IT organization is expected to deliver application projects on time and on budget, based upon the business unit's requirements and priorities - plus be a solid utility.

Some see CIT here → Solid utility

Keep the lights on: The IT organization is expected to provide cost effective-dial tone reliability with transparent costs.

Figure 4: Diagram Illustrating Confusion Over the Role of CIT

Without a formally agreed model in place, an ad hoc and variable approach that is open to interpretation by each team, division and department has been established. This contributes to a complex and somewhat siloed environment where various teams are pulling in different directions.

In some situations, this means that some departments choose not to work with the CIT Division on technology initiatives and projects while, in other situations, the business units do work closely.
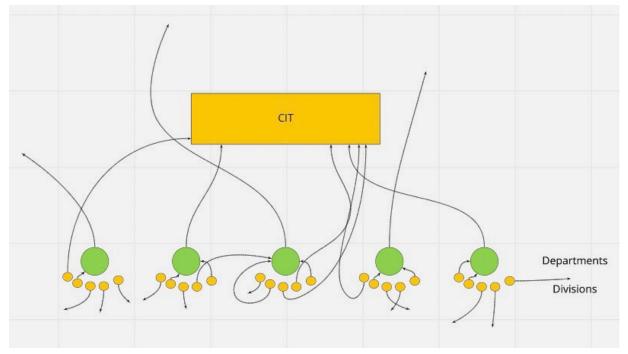
Figure 5: Current Operating Model

This diagram illustrates the current disjointed and inconsistent, if not chaotic, operating model where some departments interact with CIT while others do not; where some divisions interact with some departments and/or divisions and/or CIT and some do not.

The consulting team notes the following characteristics in the current model:

- Non-aligned technology investments and strategy.

- Decentralized decision-making and prioritization of efforts and initiatives.

- No central design authority.

- Workplan activity is opaque / unclear accountability = delivery timeline drift.

- No capacity checkpoints = a tendency to over-commitment and under-delivery.

- Perceived to promote local innovation, although capitalization on local innovations rarely are scaled to deliver corporate value.

- Difficult to achieve corporate-wide consensus and make progress on corporate-wide issues and opportunities.

- Defaults to local / non-corporate approach which results in divergence, duplication, overlap, application proliferation and ever-increasing complexity.

The current arrangement has not been consciously designed by City leadership. It has evolved over time and is sub-optimal, delivering less-than-satisfactory outcomes.

Some form of change is necessary.

2.3.2   Current Governance

The consulting team's assessment of the current governance model suggests that there are key gaps in the City's technology governance approach.

This means that the City's technology investments and program delivery lack the oversight and coordination necessary to be as effective as possible and to optimize the use of limited funds and efforts.

The table below shows the consulting team's evaluation of key governance functions that should be in place.

It indicates that Thunder Bay is either weak or does not have structures or processes in place relating to an Executive IT Steering Committee, programs and systems working groups, an IT intake and investment process, project portfolio and project delivery, IT policies and IT architecture and standards.

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Typical Structures and Processes	High Performing	CTB	
Executive IT Steering Committee	Yes	Weak	CIT Steering Committee ineffective
Working Groups (Programs, Systems)	Yes	DNE	No specific groups defined or meeting consistently to oversee core systems (roadmaps, expansion, projects or upgrades)
IT intake & investment process	Yes	Weak	No formal process for rating/ ranking/ prioritizing technology requests across portfolio – business adds items to budgets
Project portfolio & project delivery	Yes	Weak	Lacking project delivery engine
IT policies	Yes	Weak	1 IT policy. New policies are being developed
IT Architecture & Standards	Yes	Weak	There is no formally defined architecture

Figure 6: IT Governance Assessment

We believe that maturation of governance processes is critical to achieving greater focus and to advancing the City's digital agenda.

2.3.3   IT Management Best Practices

We also noted important gaps in the City's maturity in terms of key functions that the City should have in place to deliver technology and digital solutions effectively.

The following table illustrates the results of our findings. This table lists the key capabilities that we believe a municipal organization should have in place to operate their IT function effectively and appropriately.

While IT Service Desk, IT Financial Management, BCP and IT DR Plan and IT Security are rated as "strong", there are several areas noted as "weak" and Project and Program Management is non-existent (Does Not Exist – DNE).

Figure 7: IT Management Practices Assessment

We flagged two specific areas – Architecture and Project and Program Management – in which we did a deeper dive to fully understand the current state.

Architecture & Roadmaps	High Performing	CTB
Information & Data Architecture	Yes	DNE
Application Architecture	Yes	DNE
IT Architecture "Board"	Yes	DNE
Key IT Infrastructure Roadmaps	Yes	Ok
Key Application Roadmaps	Yes	Weak
Technology Standards	Yes	Ok
GIS Strategy	Yes	Ok
Web & Digital Strategy	Yes	Weak
Ability to monitor future technology trends	Yes	DNE

Figure 8: Architecture and Roadmaps Assessment

Project & Program Management	High Performing	CTB
Standardized opportunity intake process	Yes	Weak
Prioritization/ranking of opportunities	Yes	Weak
Project Management Framework	Yes	DNE
Project portfolio performance reporting and monitoring	Yes	DNE
Resource Management	Yes	Weak

Figure 9: Project and Program Management Assessment

The consulting team concluded that the City lacks an effective "engine of project delivery" – a shared and consistent methodology and a dedicated team of staff who are skilled at repeatedly and successfully delivering technology initiatives – and it needs one for the work ahead.

This is a core competency that the City should develop.

Also, the City needs to do a better job of evaluating solutions for "fit" with the City's existing technology estate – this is the role of IT Architecture – to which the City currently has no resources assigned.

In both areas, the City's capability and capacity is limited. If not addressed, this will inhibit future progress on digital objectives.

2.3.4   IT Organization Structure

The consulting team notes that the CIT team has some good skills, capabilities, and strengths in the management of the core technology environment, helpdesk services and application support.

As a result, the 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 City has low maturity (as identified in the previous section).
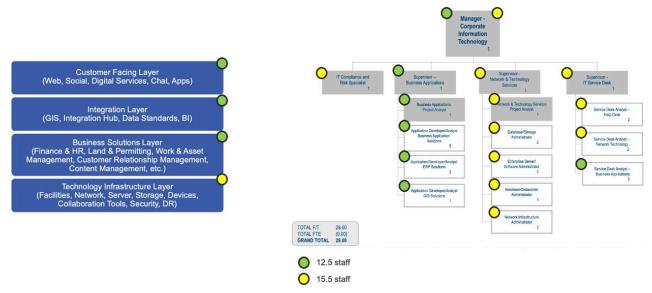
Figure 10: Current CIT Organization Structure

The business solutions space is less well-resourced than other teams in CIT 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.
- GIS leadership.
- Data and analytics.
- Digital solutions.

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

2.4 Benchmarking Results re: Investment in IT Staffing

In the context of organizational needs, when benchmarked against other Ontario municipalities, Thunder Bay's investment in IT staff is significantly lower than comparable peers.

As illustrated in the summary slides below, for IT Staffing (percentage of total), Perry Group's suggested range is from 2.5% to 5%; Ontario municipalities generally fall in the 0% to 3.7% range. Thunder Bay sits at 1.2%.

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Perry Group's suggested range for IT Operating Expenditures is from 2.5% to 4.5%; Ontario municipalities generally fall in the 1% to 3.5% range. Thunder Bay is at 1.2%.
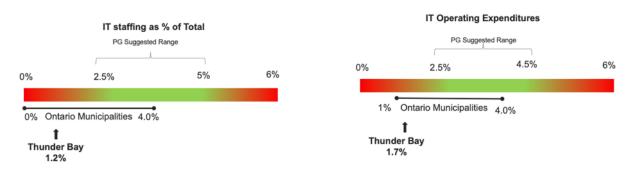
Figure 11: Benchmarking Results

Thunder Bay's expenditures are below peers and the median rates flagged by the Municipal Benchmarking Network (MBN) benchmarking.

The City operates well below the Perry Group recommended ranges for IT staffing and within the operating expenditures which suggests that municipalities should target at minimum 3% of staffing and budgets toward technology. Gartner and other IT industry benchmarking sources suggest higher levels of IT investment.

The consulting team also reviewed historic CIT staffing levels. The data indicates that, albeit with some fluctuations over the years, the City's CIT team in 2021 is the same size as it was in 2001. In those 20 years, the importance and impact of IT on the organization has been transformed.
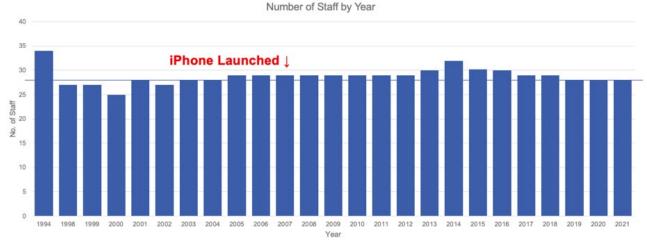
Figure 12: Historic CIT Staffing Levels

This data, coupled with the benchmarking data shown above, suggests that the City is under-resourcing the technology team.

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2.5 Program and Service Review Recommendations

Many of the findings of the consulting team's Digital Strategy discovery work echoes observations from the Grant Thornton Program and Service Review.

The PSR report made the following recommendations, with which Perry Group is in full agreement and which many of the recommendations contained within the Digital Strategy are designed to address.

PSR Recommendations

"Overall, IT should be considered a strategic pillar to service delivery and internal processes. As such CTB should consider technology to be a core function and area for inclusion for any project/process being planned or implemented."

"Initiated IT projects should be tied to projected ROI and then actual ROI measured to see if IT is optimized."

"IT should be a part of groups such as cross-CIT (and functional project teams or planning committees to across all departments). CIT informs divisions of how technology can tie into their activities/objectives."

"Potential investment might be needed for each division to hire or expand roles of dedicated superusers."

"Develop more performance metrics to demonstrate progress and success and communicate them with relevant internal leaders."

"The City should develop a comprehensive Digital Strategy that is connected to the overall City Strategic Plan and its objectives. The Digital Strategy should encompass all aspects of Information Technology in the City including use of technology, data handling and data security, schedule for updates, best practices on how to choose technology software, when and where to involve the CIT team on general and division level projects. The parameters of where CIT can help divisions and which areas divisions need to resource themselves should be outlined."

"The Strategy could tie to business outcomes (automation, savings, productivity, less duplication which can be tied to ROI projections). The Digital Strategy should define divisions clearly and communicate to all to improve understanding of what each division is responsible for. The communication of the Digital Strategy should include how technology will be used to achieve the goals of the corporate Strategic Plan."

"This will allow for proper staffing and budgeting at the division level in other departments."

"A standard methodology should be created for divisions software, for choosing vendors, purchasing, implementation and ongoing maintenance with a clear understanding of what CIT's leading role should be in said vendor selection/implementation processes."

"Communication of the importance of IT can empower the CIT team to become more proactively involved in organization decision-making and play a more active role in transforming how both internal and external services are more efficiently delivered, e.g., how to incorporate Smart City initiatives within various divisions. Development of a

Strategy might require investment for an external consultant (if needed) and implementation."

"A comprehensive plan to address software updates with regards to performance and security is essential. The plan should outline when scheduled updates occur and should be communicated with all departments. Information should be shared online such as the main Intranet page."

2.6 Digital Maturity Assessment

Finally, to wrap up all the assessments, the consulting team conducted a maturity assessment, using Perry Group's municipal Digital Maturity Assessment.

The Digital Maturity Assessment is the basis for assessing the current state, identifying future opportunities and identifying the targeted state.

The results of the Digital Maturity Assessment and Progression help to clearly delineate the stages of progression and what each stage means to the end user.

The figure below identifies 5 Levels of digital maturity:

- Level 1 – Digital Resister
- Level 2 – Early Experimenter
- Level 3 – Digitally Accelerating
- Level 4 – Digitally Transforming
- Level 5 – Digital Leader

The Digital Maturity Assessment helps a municipality identify what its current level of digital maturity is as well as what it strives for its target state to be.

It can easily be used as a benchmark for tracking, measuring, and reporting on progress against the defined targeted levels of maturity. It can also be used to monitor improvements over time.

The assessment scores Thunder Bay 2 out of 5 for its digital maturity, illustrating there is much ground to cover to become a more digital organization.

In the figure below, the items highlighted in blue and yellow highlight current characteristics that the consulting team observed; green points to the characteristics or capabilities that the City must put in place to make progress to becoming a digitally accelerating organization, namely:

- Put Governance in place.
- Focus on increasing digital literacy and collaboration.
- Digitize cross-corporate processes end-to-end.
- Put key digital platforms in place.
- Define current and target technology.
- Conduct data analysis to assist informed decision-making.

1. Digital Resister

- No leadership, vision or strategy on digital along with an absence of governance and business strategies
- There are few digital skills within the organization which is typically unengaged, traditionalist and uncollaborative
- Business focus is not citizen centric and the approach on customer service is divergent and siloed between areas
- Corporate systems are absent or utilized < 10% leaving siloed areas largely reliant on inefficient manual workflows
- Digital service is hampered by an anti-cloud position with an overburdened IT acting as an "order taker"
- Data is looked at for compliance purposes versus rather than an asset that can be leveraged for efficiency and service delivery

2. Early Experimenter

- Some visioning around digital but there are competing views between service areas
- There are small pockets of digitally skilled, tech-savvy staff, but largely are unguided and unconnected – digital is explored off the side of their desks
- Culture is skeptical of change and project management is disconnected from corporate objectives and strategy
- Core business solutions are in place but are outdated, some digital tools but aren't fully leveraged or integrated as decisions are made by service areas directly
- Some collaborations between keeners in each areas, however, notions of digital differ widely
- No corporate standards, practices or resources are in place to support ideation and leverage digital tools already in place

3. Digitally Accelerating

- Governance is in place to align digital and business strategies with guidance from corporate policies, standards and a service inventory
- Recruitment and training efforts have some focus on increasing digital literacy and collaboration is ad-hoc, but occurring (internally and externally)
- Core high volume, cross-corporate processes are fully digitized end-to-end and if digital tools are not deployed, staff are finding and using their own to make work easier
- Agile approaches are used to support small and niche implementations and key digital platforms are in place but lack integration and consolidated value
- Current and target technology architecture is defined but some key systems and infrastructure are delaying growth of digital
- Digital processes and use of agile are designed to be repeatable and slowly scaling out and data analysis is assisting some areas in making better decisions

4. Digitally Transforming

- Senior leadership and Council are formally behind digital transformation with alignment to strategies, talent recruitment and training
- Digital is embedded into business planning and service channels are used to index improvement projects delivered through agile and followed up by quality audits
- There is active engagement and collaboration with community and industry partners along with a 360 view of customers with a mission to exceed service standards/expectations
- An architecture function guides evolution of the technology landscape along with data governance and cloud adoption
- End-to-end processes are fully digitized and core systems are current, well utilized and managed as products vs. projects
- Customer profiles and predictive service delivery employed through some integration of web, a digital platform and a CRM – not employing all capabilities but priorities are reviewed to support forward momentum

5. Digital Leader

- Digital is the mantra of the organization driven by aligned leadership and governance who focus on the "art of the possible" vs. digital transformation
- Experimentation, collaboration and coproduction are business as usual and all areas employ a design-thinking approach to meet and optimize service standards
- Digital inclusion opportunities are made available through community partnerships and customers are actively involved in shaping/prioritizing how service is delivered
- Modern, digital and mobile platforms in place evolve alongside defined architecture and a roadmap that standardizes digital/cloud/data-first
- Digital service channels are supported by web and CRM which provide predictive service to citizens and improved using aggregated service data
- Business processes are geo-coded, IoT based infrastructure is the norm and machine learning/AI is employed to make work more efficient

Figure 13: Digital Maturity Scale

People	
Corporate Leadership	2
Digital Vision	1
Digital Strategy	1
Digital Leadership	2
Digital Talent	2
Digital Literacy	1
Digital Governance	1
Organizational Alignment	1
Workforce Readiness / Change Readiness	3
Digital Culture / Tech Savviness	1
Community Involvement in Digital	1
Industry Partners	2
Customer Knowledge / User Research	2
Community Digital Inclusion / Literacy	3
Average People Score	**2**

Process	
Service and Process Inventory	2
Service Standards	2
Process Maturity Assessment	2
Process Design Capability	2
Process Digitization	2
Agile Methods and Approaches	1
Technology / Digital Training	1
Change and Adoption Management	2
Modern Procurement	1
Average Process Score	**2**

Technology	
Architecture	2
Applications / Business Solutions	2
Mobile	2
Collaboration	3
Customer Digital Experiences	2
Staff Digital Experiences	2
Web Platform	3
Digital Service Platform	2
CRM Platform	1
Cloud	2
Social	3
Data	2
Analytics	2
Geo / GIS	2
Connected Things (IoT)	1
AI / ML	1
Networks (Private, Public, Community)	2
Average Technology Score	**2**

People 2/5
Process 2/5
Technology 2/5

Level 2
Early Experimenter

Figure 14: Digital Maturity Assessment Scores

Following is a summary of the City's current state which puts the Early Experimenter mode into context.

While a Level 2 – Early Experimenter may appear to be a low score, in fact, the City shows some characteristics of a Digital Resister (highlighted in yellow, for example, Corporate and Digital Leadership, Digital Talent, Industry Partners, Customer Knowledge, Customer and Staff Digital Experiences, Digital Service Platform, etc.) which would rate the City at a Level 1.

Clearly, any resistance to digital opportunities must be tackled (the Strategy focuses on expectation setting, education, training and showcasing) if the City is to progress on its digital maturity journey.

2.7   Current State Summary

The current state assessment confirms that the City of Thunder Bay has some significant work ahead.

The City appears to be behind peers such as Cambridge, Kingston, Guelph, Milton, Waterloo, Chatham-Kent, Newmarket, and Red Deer in taking advantage of technology and digital capabilities to deliver efficient and effective City services. There is some significant catch up required.

As noted in the 2020 Program and Service Review, there are numerous opportunities in every division and business unit across the City to use technology to deliver more effective customer service and to deliver more cost-effective services.

In fact, demand in each of the business units is significant. Meetings with teams from across the City identified over 260 possible digital and technology initiatives that the City could pursue that would result in streamlined processes and improved customer experiences – this is perhaps 10 years of work.

The City cannot possibly tackle all this work in the short- or even medium-term. It must prioritize the most impactful initiatives that align with strategic objectives and commit resources to implementation.

But, capitalizing on these opportunities will require investment – investment up-front in staffing and resourcing projects, consulting services, software and solutions, training, and education – to save in the long-term on process and automation efficiency, agility and flexibility, policy and cost saving insights. A classic invest-to-save equation.

We believe that 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.

So, the next sections of this Strategy lay out a Vision, identify the priorities, and set out how the City can set itself up for future digital service success.

3.0   Digital Vision

In light of the current state findings, the Digital Strategy starts by setting a new Vision for the role and importance of technology at the City and the way that services should be delivered.

3.1   The Vision

The Vision for the City's information, technology and digital programs is to pursue:

A collaborative approach to delivering
customer-centred, digitally-powered City services.

The Vision encapsulates some important ideas.

- That collaboration is at the heart of digital success.

- That City services to the community is the core of what Thunder Bay is about and that "efficient, accessible, easy-to-use, cost-effective and digitally-powered" serves that mission.

- That the City should design its services around customers, not around internal needs, and

- That the City intends to modernize how it delivers services by taking advantage of digital technologies for both internal and customer-facing services.

3.1.1   Customer-Centred, Digitally-Powered City Services

What do we really mean when we say "…***customer-centred, digitally-powered City services***?"

In a future in which services are digitally-powered, interacting with the City should be simple, straightforward and designed around convenience for customers and staff alike.

The following vignettes are provided to help the reader understand the trajectory that the Strategy establishes, if not the exact solutions that will implemented.

On her way to work, Mary witnesses a minor car accident. A stop sign has been knocked over. Mary pulls out her smartphone, takes a photo of the scene and uses the CityApp to notify the City of the problem.

The notification is received, automatically categorized, located, and recorded in the City's customer request management and work management systems.

The work management system automatically dispatches a request to a crew in the area who receives it on a laptop in their work vehicle. As an emergency work order, they proceed to the site and erect a temporary stop sign. Mary gets an update to let her know that a temporary fix is in place.

On the way home from work, as she passes the scene of the accident, Mary feels reassured that the City is working hard and smart to keep citizens safe.

A couple of days later, the sign crew visits the site and replaces the stop sign. Mary receives a notification on her smartphone that the issue has been resolved and is

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asked to rate her satisfaction with her interaction with the City. She is pleased with the service and rates it highly.

In the background, integrated technologies such as telecommmunications, networks, mobile devices and business systems (e.g., CRM, Work Management, GIS, and Finance systems) are working in concert to allow customer service agents to offer simple access to services and for work crews in the field to be provided with the information (asset records, maps and drawings) they need to fulfill the work order. Processes have been designed across departmental lines to make the end-to-end process simple for customers to interact with and easy for staff to administer.

Marc has moved into a new home in the City. He calls the City to inquire about setting up his tax payments via direct deposit. The customer service agent directs Marc to the online sign-up page on the City's website.

The agent shows Marc other services available online and asks, "Is there anything else I can help you with?"

Marc proceeds to book his youngest child, Rachel, into swimming lessons, locate the nearest library, find out when garbage collection day is and where he can pick up a new compost bin, and checks out parking options near his new job and purchases a parking pass. All with one call.

Enabling customer service agents to handle multiple transactions from different departments doesn't happen by accident. It has to be planned, processes must be designed, and systems implemented and integrated to allow agents to provide answers to commonly asked questions and to route requests to the approriate back-office team as needed.

A local developer, Nicole, has received approval for a small townhouse development in a local neighbourhood and is now ready to build.

She goes to the City's website to apply for the necessary building permits where she completes each application, uploads the drawings, and pays for the application.

The City reviews the plans and circulates the digital drawings to various departments and external commentors. The City requests a number of revisions which are marked up digitally and returned to Nicole. Nicole submits amended drawings online, which are approved, and the permits are duly issued.

As building proceeds, Nicole needs the footings to be inspected. Using her smartphone, she books an inspection for the next available slot. Jim, the assigned inspector, meets Nicole on site the next day. Using his tablet to conduct the inspection, he takes pictures and records all the checks in the system.

With the inspection completed, Nicole's build is greenlit and Jim emails the inspection results to Nicole before heading off to his next inspection.

End-to-end, real-time transactions are becoming common in the private sector (think about hotel or airline bookings or interactions with your bank) and are increasingly expected by those who interact with the City. Moreover, significant efficiencies are achieved; in the example above, think of the reduction in paper, elimination of unnecessary customer visits to City Hall, and reduced costs and delays from mailing out inspection results, to mention just a few.

On a summer evening stroll, Gilles notices a new development approval sign on a vacant lot near his house. He notes the application number and when he returns home, searches the City's website for information.

He finds the full details of the planning application, its status and planned timelines, drawings, and renderings of the proposal. He also finds a listing of related meetings (community consultations, Committee of Adjustment) and reviews video recordings of the meetings to find out more about the history of the application.

The website allows Gilles to set up alerts to be notified of future activity and consultations on this planning application. He can submit his comments and questions about the proposed development online, and he can review comments submitted by his neighbours. Gilles feels engaged in a local decision that is important to him and his family.

Each interaction leaves a lasting impression of how efficient and effective the City is and allows for more effective engagement with more transparent government processes.

At the end of a day of meetings, Beth (who has worked for the City for 12 years) remembers she needs to book vacation time for an upcoming trip she is going to take.

She pulls out her City-issued smartphone and opens the CityApp. She checks her vacation bank to make sure she has enough leave and then makes the request. She fills her timesheet for the day in the time recording portion of the App and remembers she has an expense claim to make for lunch she purchased for meeting attendees as they worked through lunch.

In the CityApp, she takes a picture of the receipt and submits the expense claim. The system automatically routes the leave request and expense claim to Frank, Beth's boss, who checks the staffing schedule in the CityApp for coverage and, seeing that all is well, approves Beth's leave request and the expense claim.

It is not just customers who appreciate efficient, simple, and easy-to-use processes. Staff and Managers within the City are often frustrated by inefficient, slow, paper-based internal processes. Modernizing the employee experience so that frequent interactions and tasks are streamlined and easy-to-use, increases productivity and reduces frustrations.

City Fire officials are determined to reduce residential fires in the City. They turn for help to data collected over the years on residential fires.

Spatial analysis identifies a number of hot spots in the City with a higher propensity for residential fires. The combination of this insight with data about the type, severity, and cause of fires and other demographic and socio-economic data, allows Fire officials to identify important characteristics of fires in these hot spots – such as unattended cooking and smoking.

This information helps the Fire Rescue Service target its resources more effectively with concentrated communications and advertising, fire prevention education and inspections, all of which contribute to a 10% reduction in residential fires, significantly reducing loss of life and property in the City.

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Data analysis, such as in the example above, has value across all parts of the City's operations, from snow clearing to recreation programs, from capital construction to economic development. It is anticipated that deeper data analysis will reveal opportunities for improved outcomes, service delivery cost savings, efficiencies, and improved service delivery.

These are not, and should not be, dreams of a long-distant, unattainable future. Municipalities across Canada are delivering their services in this way today.

For instance, citizens in Guelph, Waterloo and Cambridge can submit and track building permits and drawings online. Burlington staff and management handle their time and attendance processes via an employee app. Barrie residents monitor their water consumption via an online dashboard. In Innisfil and Richmond Hill, reports of a stop sign being knocked down are directed automatically to the relevant field crew's mobile device for resolution. In Oakville, people can search and review planning applications and associated drawings online or lawyers can generate their own tax certificate online. Brampton and London Fire Departments use GIS to identify hot spots, focus their fire prevention and education work and reduce risk and loss in their communities.

Communities throughout Ontario are using technology in many ways to provide innovative and cost-effective customer service.

The vignettes provided here are used to paint a picture of the future that the City should aspire to and aim for and this Strategy is designed to take the City in this direction.

3.2　The Importance of Digitization

However, before the City can itself achieve this Vision, it must digitize its processes – an area in which it currently lags behind its peers.

To enable the types of integrated service offerings experienced by Mary and Marc, Nicole and Gilles, Beth and Jim, the City must use its business systems to digitize and automate processes.

As has already been noted, today, too many of the City's processes – such as its work management, land development permitting, and HR processes are paper-based and manual – inhibit the ability to deliver these improved services and experiences.

Effective municipalities rely on a combination of **people**, **processes,** and **technology,** working together in a synchronized fashion, to deliver services to customers, as illustrated in the diagram below.

This Strategy introduces some new terms to guide leveraging technology to improve processes. The term **digitized** represents a move away from paper-based processes to electronic, online, workflow managed, real-time processes. The term **platform** represents a common set of **processes** and **technologies** that connect staff and customers to deliver a set of services.

The **digitized platform** supports electronic end-to-end processes.
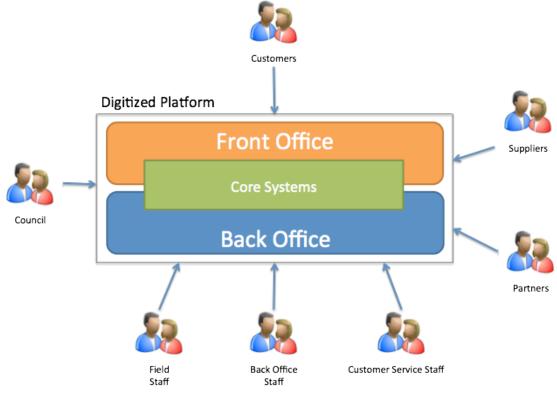
Figure 15: The Digitized Platform

The digitized platform is centred upon a powerful central core of business systems (e.g., Enterprise Resource Planning (ERP), CRM, Work Management, Permitting, Licensing and Land, Recreation Management) that drive large parts of the City's operations.

The business systems used by the City should be common and shared across departments and divisions so that tasks initiated in one area can be allocated to another, such as a change in a permit application status (in Building) triggering the processing of a pre-approved payment (in Finance).

The full digitization of processes provides the foundation for becoming an efficient organization that can deliver *great services, digitally-powered.*

When processes are digitized and managed electronically, all necessary transaction processing – workflows, notifications, quality checks and validations – can be carried out via a device, and can happen anywhere, anytime (in the office, at a worksite, in a truck at the side of the road, or at home).

Offline steps (manual interventions such as checking a paper file or getting a physical signature) are reduced or eliminated. The online chain provides complete visibility of the process throughout the organization – anyone can check the status or find out required information.

Systems manage the routing and workflow of the processes, including escalating items to senior staff when exceptions are encountered or where performance falls below defined levels of service.

Digitization allows the City to track its own processes, to share information between staff, and to track important management metrics that provide insights that contribute to improved process effectiveness.

In the planning application example from earlier in the report, Gilles can only find information about the planning application in his neighbourhood on the City's website if that process has been digitized in a corporate business solution.

If the necessary information is not stored in the business solution, or is not updated in real-time, or if the Committee of Adjustment meetings are not streamed and recorded then Gilles will not be able to get to the information he needs.

Digitization also makes it easier for the City to add new services or processes (such as the introduction of a new business-license type) because changes can be introduced through existing business systems that already support the online applications process, back-office administrative tracking (such as processing payments) and providing data to field crews.

Transforming from paper-based to digitized processes will involve persistent organizational as well as technological change for both IT and each business unit. This Strategy lays out an approach to accomplish this.

As highlighted in the MTM above, Thunder Bay is missing or under-utilizing some key business systems that form the core of digital platforms and are central to the City's becoming *powered by technology and data*.

Getting these in place are the necessary pre-conditions to delivering improved services and experiences.

3.3 Omni Channel: Providing Customer Choice

Digitization – or the introduction of digital services – does not mean that traditional access channels will be neglected. It is important to acknowledge that, while the City's focus on digitization drives the ability to deliver online services, it also supports improvements to phone or face-to-face services. The City will, of course, continue to offer services across many channels (web, phone, face-to-face) to meet the needs and expectations of its citizens.

The City will continue to support customers' preferred modes of interaction ensuring that no one is left behind. If a customer wants to raise a complaint about a pothole face-to-face at a local City facility, great! If a different customer wants to raise a similar complaint via a smartphone app and follow up on its status by calling into the City, that's great too!

Digital platforms must support the ability to deliver across *all* channels.

3.4 Achieving the Vision

The Vision articulated is necessarily a long-term goal, likely much longer than the immediate 3-5-year time horizon of this Strategy.

The <u>first priority</u> for the City in the near-term is to establish the conditions for success.

This means establishing an effective, enterprise-wide technology program that is well-governed, focused on agreed priorities, resourced and effective at delivering business technology solutions. Thus, the immediate priorities for the City relate to IT Governance, technology funding, resourcing and management practices.

While there is work to be done in all layers of the MTM, the second priority for the City is to deliver digitized processes and thus core business solutions.

Figure 16: Focus on Business Solutions Layer of the MTM

By comparing the City's current state of IT to the MTM (shown in the diagram above) the recommended focus should be on the Business Solutions layer to build the City's **digitized platform.**

The MTM assessment identifies opportunities around integration, data and customer-facing services. In the Customer-Facing Layer, a CRM system will be important but this can only be achieved once the City has established its overarching Customer Service Strategy.

Examples of the service impact of some of this planned work includes implementing and expanding core business systems, such as AMANDA (to support Nicole's and Gilles's experiences), determining our asset management systems strategy (to support Mary's experience) and expanding SAP (to support Beth's and Marc's experiences).

While the City works hard in these areas, several initiatives will also work to advance those online services that can be implemented without a back-office solution dependency.

The <u>third priority</u> is to create a tech savvy and digital culture where IT and departments partner to first define the value of new technology investments and then measure and deliver that value.

With the Vision for the Strategy established, the following three sections introduce the how, who and what of the Strategy.

How will the City establish the framework for effective technology management?

Who is responsible for which areas of technology? and

What projects need to be tackled?

4.0   Making IT Happen – Building the Framework for Success

Achieving the Vision described is a change for the City and will require much work.

Working smart – in a coordinated and genuinely collaborative way and on agreed priorities – will be critical. Thus, one of the key goals for this Strategy is to establish the conditions for success for managing technology and driving digital transformation.

This section outlines the **how** – a series of recommendations that focus on how the City should improve its approach to technology and how the management of the technology program will change.

4.1   Information, Digital and Technology Governance

One of the first and most important areas of work for the City at the outset is to establish a formalized Information, Digital and Technology Governance Framework to allocate technology decision-making responsibility appropriately.

The goal is to ensure that the City is *working on the right projects, in the right way*, and ensure that decisions and resources are suitably aligned with corporate goals. In support of this goal, the framework needs to enable monitoring and evaluation of progress and outcomes.

4.1.1   What is Information, Digital and Technology Governance?

IT governance is the broad industry term used to refer to "the processes and structures which inform, direct, manage, and monitor how the organization makes the best and most effective use of technology."

It is designed to ensure that the right people are making the right decisions, at the right time, with the right information.

In some cases, technology decision-making will mean collective decisions on corporate priorities; in others, it will involve technical decision-making such as the best data storage technology. Thus, it necessarily involves different groups with different knowledge, experience, and skill sets.

Organizations often view decisions about technology as complicated, technical and "best left to the experts in IT". However, decisions about technology often reflect fundamental questions about business priorities and how service gets delivered, such as:

- How do we want to use technology in our business?
- What technology do we want our people to use, and how do we want them to use it?
- How much should we spend on technology?
- Which of our business processes should we direct our IT dollars toward?
- What do we need to tackle first?

- Should we do this now, or later?

- How secure do we want to be?

- What should be available first in the event of a data centre outage or a disaster event?

These are not just decisions for technologists in the CIT Division – they are important business decisions for leaders of the organization.

There will always be purely technical decisions for IT staff with the appropriate expertise to make; but in most cases, IT experts should be advising business leaders – providing options and recommendations.

An IT Governance Framework facilitates this collaborative working, assigning accountabilities and, at the right time, bringing together the appropriate mix of leadership and staff from appropriate departments and disciplines.

An IT Governance Framework for Thunder Bay should have the following goals.

- Establish a clear mandate and authority for **all**[1] information, technology, and digital decisions.

- Engage stakeholders directly in technology and digital decision-making.

- Better coordinate corporate technology and digital initiatives for which wider benefit can be derived.

- Establish a more rigorous evaluation and selection process for technology and digital projects – to ensure a focus on "high value" projects (aligned with budget).

- Ensure more effective resource utilization within IT and the business by focusing on corporately-agreed directions.

- Track the business benefits and value accrued from investments in technology.

The recommended framework is made up of four elements, discussed in greater detail in the following sections:

1. Decision-making groups and individuals (e.g., group membership, roles and responsibilities, inter-relationships).

2. Policies and standards (e.g., architecture, software procurement policy).

3. Processes and methods (e.g., prioritization, project execution).

4. Measurement and monitoring (e.g., Key Performance Indicator (KPI) reporting).

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[1] This refers to information management, technology, digital and operational technology decisions.

What is Operational Technology?

There has traditionally been a distinct line between Operational Technology (OT) and Information Technology (IT).

So, what is the difference between IT and OT?

In short, IT deals with information, while OT deals with machines. The former manages the flow of digital information (data), while the latter manages the control and operation of physical processes and the machinery and devices used to carry them out, e.g., chlorinators, pumps, etc.

OT is traditionally associated with industrial environments and includes industrial control systems such as supervisory control and data acquisition (SCADA).

However, increasingly in industry, in municipalities and utilities there is a growing convergence and intersection between Operational Technology and Information Technology where accessing OT through IT systems brings shared benefits.

For example, benefits can be achieved by using shared networks to reduce maintenance and operations costs, by applying consistent security controls and management practices, or by collecting information from Operational Technology systems and integrating that data with Information Technology systems. For instance, connecting SCADA systems to work management systems to generate preventative maintenance work orders when a pump has run for an allotted amount of time, or for an LED streetlight to self-report an outage.

An increase in the use of Internet of Things (IoT) technologies and an increased number of sensors on vehicles, as part of water networks, on light poles, and in garbage cans, only further blurs the line between OT and IT.

The governance model presented in the Strategy is intended to tackle information, technology, and digital domains. It also heightens the importance of, and attention paid to architecture. Designing how OT and IT interact and share infrastructure is an important part of this.

So, going forward, any technology – regardless of whether it is OT or IT – that creates data should be subject to the broader information, digital and technology governance process.

Practically speaking, what does this mean for those that operate and rely on OT systems? Day-to-day management of Operational Technology continues to be the responsibility of those who use that technology to deliver the service (people in Fire, EMS, Water and Wastewater, Traffic, Transit, etc.).

However, significant OT initiatives should progress through the Idea → Project Lifecycle, follow the PM practices laid out for technology projects, and should be monitored and reported as part of the overall IT portfolio.

Furthermore, OT systems should be subject to regular security checks and testing as part of the corporate security program.

4.1.2 Decision-Making Groups – Governance Model

The Information, Digital and Technology Governance Framework defines groups and individuals with clearly-defined responsibilities and accountabilities.

It is important to note that the words **Information, Digital** and **Technology** have been broken out deliberately. This is to reiterate the importance of focusing on Information and Digital, as well as Technology as separate disciplines and domains that are governed in a coordinated and singular manner.

This means that information-management-centric topics (such as document and records management, retention of electronic records) are part of the domain of the Information, Digital and Technology Governance Framework, as is strategic decision-making around the City's website and digital services.

At this stage in the City's journey, the most important function of the governance model will be to keep the City focused on priorities that support corporate objectives – this will require the authority of the EMT.

At the same time, the governance model must directly engage GMs, Directors and Managers in decision-making, ensuring that buy-in can be secured, feedback can be received, and that institutional learning about how to effectively deliver enterprise IT programs can be developed.

As a result of these drivers, the following governance bodies are suggested.

- **Information, Digital and Technology Governance (IDTG)**
  This will be a leadership level group, made up of EMT members and the CIT Director and resource supports from the CIT Division.

  This group should be responsible for corporate leadership of information and technology decision-making about strategic directions, reviewing and recommending investment priorities into the budget process, monitoring project and service delivery, and reviewing and approving recommended corporate IT architectures, policies and standards.

- **Coordinating Groups**
  These are strategic working groups convened as recommended by this Strategy to provide focused governance of critical enterprise systems or information processes. They are responsible for the more detailed aspects of developing program plans, recommending initiatives/projects within program areas and for monitoring progress, resource usage and outcomes.

  These groups will be made up of Director- and Manager-level individuals.

  Program plans developed by these groups are reviewed and approved by the IDTG. It is recommended that, initially, groups for the following areas be established:

  o Digital, Web and Customer Service.

  o Enterprise Resource Planning (Finance/HR – people and money).

  o Asset Management Systems.

- o Land and Property Systems.
- o GIS and Data.
- o Information Management.
- o Digital Workplace and Technology.

Other groups may be added in future, for instance around information management or mobile working.

- **Project Teams**
  Project teams are formed and disbanded as needed to tackle business technology projects. Depending on the size of projects, different roles must be formally assigned, including Sponsor, Project Manager, Business Analyst, Technology Lead, and business side Subject Matter Experts (SMEs).

  Projects should follow the standard methodology (discussed later) adopted by the City. Project teams will be responsible for providing regular project status reports and will be subject to project review by digital delivery.

- **Architecture Team (AT)**
  This group will be a "virtual team" or committee comprising architecture leads from the CIT Division (and perhaps some tech savvy Business Analysts). The group will be responsible for defining, developing, and recommending technical and architectural standards to CIT Management. The CIT Director should then bring proposals / recommendations forward to IDTG for review, endorsement, and/or approval as necessary.

  The group's mandate includes the development of lifecycle/roadmaps to ensure sustainability for the City's IT environment as well as reviewing ideas, concepts, and project proposals to ensure compliance with architectural standards.

4.2   Supporting Governance Functions

CIT Director[2]
Responsible for leading the development of technology strategy and policies, overseeing the operation of the Information and Technology Governance Framework, and acting as an advisor to the Information and Technology Governance Team on all matters related to effectively leveraging technology. In addition to governance support, the CIT Director is responsible for CIT Management as described by COBIT[3], "Management plans, builds, runs and monitors activities in alignment with the direction set by the governance body to

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[2] Note that the Digital Strategy recommends that the CIT Manager position be made a Director level position and the Supervisors in CIT also be reviewed in line with the City's guidelines for Job Levels.

[3] Control Objectives for IT – an internationally recognized and widely applied IT Governance Framework.

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achieve the enterprise objectives."

The CIT Director has management responsibility for the governance supporting groups including IT Delivery and Architecture Teams.

IT Delivery

IT Delivery is a facilitating group based in the CIT Division that supports the Governance Framework.

In summary, it assures that CIT Management and IDTG gets:
1) Properly formed project proposals;
2) Consistent monitoring across the complete portfolio of information technology projects and services;
3) Resource capacity and resource utilization reports; and
4) Project quality assurance by checking compliance with project standards.

This group would also typically be the "home" unit for the project management "engine" with resources (PMs, BAs) available for allocation to selected projects, and with pre-selected Vendors of Record (VORs) to supply contract resources as needed to support project delivery.

The Governance Framework will be expected to interface with existing corporate groups and processes. Specifically, this includes:

- **LT (Leadership Team)** – The CIT Director is currently a member of Leadership Team and should keep LT informed of technology plans and initiatives on (at minimum) a quarterly basis.

- **Work Plan** – Prior to close of the annual budget and "Work Plan" setting process, the CIT Division shall work with any business unit proposing a new technological change and ensure that a suitable project proposal is available to support the request to IDTG.

- **The Corporate Business Planning and Budget Process** – IDTG should review all technology-related budget submissions (above an agreed threshold) and approve the corporate IT capital budget before submitting to the **Corporate Budget Process**.

The arrangement of the governance groups is described in the diagram below.

While it might appear at first to be a lot of groups, this is normal – technology decisions by their nature involve a wide range of stakeholders, and today, many of these conversations are happening; just not in a formalized, coordinated manner.

The City should use this framework to promote and encourage collaboration and discourage and actively penalizes rogue or independent, secretive working.
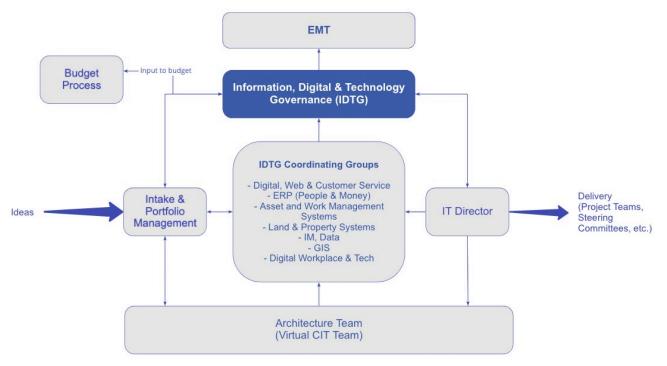
Figure 17: Proposed Governance Model

Some of the groups are IT-specific governance groups, others are involved in organization-wide governance and then there are those that facilitate the governance processes and stakeholders.

Table 5: Roles of Those Involved in Technology Decision-Making

	ITD Principles I	ITD Principles D	ITD Architecture I	ITD Architecture D	ITD Infrastructure I	ITD Infrastructure D	Solutions Needs I	Solutions Needs D	ITD Investment I	ITD Investment D	Accountabilities
Council										•	Endorse technology strategy and approve IDT investments
EMT		•							Recommends	•	Enforce principles, reinforce IDT governance, monitor performance, approve policy
ITDG	•			•		Strategic •	•		Recommends	•	Define IDT investment priorities, oversee IDT work plan, agree IDT strategy changes, approve arch monitor performance and delivery
IT Director	•		Recommends	•	Operational •	•	shared •	•	•		Lead IDT governance, strategy development and plan, deliver and manage IDT systems and services
IT Delivery									•		Evaluate projects within portfolios and assist IDTG with resourcing
Coordinating Groups			•		•		•		•		Develop medium term solutions strategies, oversee projects
Architecture Team			Recommends •	•	•		•		•		Establish and recommend standards, architecture and roadmaps, evaluate for fit.
GM's, Directors Managers & Users	•				•		shared •	•	•		Articulate business needs, requirements and priorities.
Project Teams					•		•		•		Execute against needs, and requirements.
Public / Customers							•				Express service requirements and expectations.

I = Input D = Decision

Information, Digital and Technology (IDT)

The consulting team has provided more details to City staff, in terms of the mandates and terms of reference for the various governance groups.

4.2.1 Communities of Practice

Outside of the formalized governance model, there are many people across the organization outside the CIT team who are involved in service and process design, systems usage, data analysis, web publishing, change management and providing systems training and help.

We also recognize that there are many savvy, technically-minded staff in departments and divisions who are constantly looking for better ways to do their jobs and use technology to do so.

Broadly speaking, this is the City's digital community. These are change agents who are pushing the boundaries, exploring, experimenting and learning. These people are critical to advancing the City's digital capabilities and the City should look to encourage and empower them.

There is value in harnessing this group and aligning work across the broader digital community including web, GIS, data, business support specialists and business managers.

The City should use Communities of Practice (CoPs) as an approach to tap into and share the experiences, skills and knowledge that already exist across the City.

This means using CoPs to bring together people who are working in a common area (e.g., GIS, data and analytics, project management, business process design, service improvement, mobile workers) to share learning and good practices, showcase good work, identify shared challenges and needs, share valuable information and insights and to contribute to identifying the need for standards and accelerate knowledge mobilization.

CIT will take the lead to actively enable and facilitate communities, providing groups with open digital collaboration spaces and participating in the communities as peers, listening for opportunities for improvement and amplifying where opportunities exist.

4.2.2   IT Policies and Standards

IT Policies

Consistent with the commentary throughout this section, many of the decisions related to technology are business or management decisions. These are not decisions to be made by CIT alone on behalf of the corporation. For example:

- Which employees get smartphones?
- Who can buy new technology?
- Can a member of staff use their personal phone at work?
- Who is authorized to register a web domain for the City?
- Which websites can staff access, and should that activity be tracked?
- What content is saved when an employee retires?
- How much space does an employee have in email?
- Which systems need to be up and running first in the event of a disaster?
- How secure do we need to be?

For each of these decisions, several factors need to be weighed including business impacts, employee impacts and importantly, cost implications.

Typically, IT recommendations and policy should flow from CIT, through IDTG and if necessary to EMT for final approval. City Council will retain responsibility for budget approval, is the final authority for municipal spending decisions and must approve City policies.

Policies and standards should establish the parameters within which the City uses technology and create clear expectations for those who use and manage technology. Conceptually, policies should balance empowerment with control. They should clearly define roles, responsibilities, and accountabilities.

The City has an existing IT policy framework that should be revisited and reviewed through the lens of the Vision and principles of this Digital Strategy.

A standard IT policy framework typically addresses the following areas.

- **Acceptable Use** – Provides the parameters, obligations and responsibilities associated with access to and use of City technology.

- **IT Security** – Defines how the City (as a whole) operates a secure and reliable technology environment, with adequate controls to protect the City's information assets.

- **Third Party Access** – Defines how third parties should access the City's network in a secure manner.

- **Backup, Recovery, Business Continuity and Disaster Recovery** – Defines the backup and recovery plans for computer systems that store City data. This policy is also designed to prevent the loss of City data and systems in the event of an equipment failure or destruction or security incident.

- **IT Procurement Processes** – Defines roles and responsibilities and processes for procuring technology solutions.

- **Asset Lifecycle Management** – Ensures effective procurement, maintenance and operation and replacement of IT Assets to ensure delivery of consistent, efficient, reliable, timely and cost-effective services for employees and the community.

- **Hosted and Cloud Solutions** – Defines the City's position with regard to Cloud computing and the due diligence required before procurement of Cloud solutions.

- **Data Management (Lifecycle, Privacy)** – Ensures that the corporation can effectively manage its data assets while complying with required legislation.

The CIT Director – with the input of staff and stakeholders across the organization and IDTG – should review, revise, and augment the corporate IT policy framework in the context of this Strategy to ensure that it accurately reflects how the City wishes to use and manage technology.

Policies will be developed with business unit and IDTG involvement, and approval will follow the standard corporate policy development process.

IT Architecture

IT architecture is one of the most important standards for the City and should guide decision-making moving forward.

At a high level, the MTM defines the core concepts and technological components underpinning what the City needs to deliver on its digital aspirations. The MTM represents a macro level blueprint – the equivalent of the City's Official Plan – but for the technology environment.

The MTM was introduced earlier in this document, however, one additional key architectural direction concept is "**build from the bottom up**".

Figure 18: Municipal Technology Model

For example, you cannot implement a comprehensive HR system without the network connectivity and devices that allow staff to access and run the software. You cannot create a dashboard of employee performance data without a comprehensive HR system.

Documenting the Information and Technology Architecture

The City should adopt a pragmatic approach to architecture, informed by The Open Group Architecture Framework (TOGAF)[4] standards, but an approach that identifies "just enough" architecture to help decision-making without becoming an academic exercise.

Accordingly, it is recommended that the CIT Division select a number of priority areas to develop more detailed architectures and then define clear roadmaps detailing planned architectural change.

Recommendations for targeted areas include:

- Document existing technology standards (for RFP requirements).
- Document existing software development standards.
- Formally define enterprise platforms as:
    - o SAP (HR and Financial business process management).

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[4] The Open Group Architecture Framework – a commonly used architecture framework.

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- - Hansen (Work and Asset Management process management) to be reviewed.
  - AMANDA (Land and Property-based process management).
  - ESRI GIS (spatial data management process management).
- Define Cloud Strategy, architecture and roadmap.
- Establish Identity Management standards (how users are identified, how the City will implement Single Sign On (SSO) between applications and systems).
- Define future collaboration platforms, architecture and roadmap (M365).
- Define core data standards.
  - People (employee, customer) to support CRM and ERP enhancements.
  - Property (address, street, service points) to support AMANDA and CRM projects.
- Develop Master Data Management programs to implement data standards.
- Define future Business Intelligence (BI) architecture.
- Define future customer service architecture (CRM / web / Identity Management / forms / data warehouse).

Architectural Team (AT) Process

The **who** of the AT was described above. This section describes the **how** and the **what**.

Just as the development application process is used to review compliance with the Official Plan and Zoning By-law, proposed technology initiatives should be reviewed against the architecture and the City's IT principles to ensure that the proposal complies with the City's plans for its technology environment.

As part of the intake process, the CIT Division reviews proposals and ensures fit with the architecture. Where the CIT Director determines that a proposal falls outside the architecture, the City's standards or its IT principles (and the proposer is unwilling to alter its approach) the issue will be escalated for resolution at IDTG and, if necessary, to EMT, at which point, either an architectural exception will be made, or an alternative approach will need to be sought.

Significant revisions to the architecture will also be brought forward for approval by IDTG upon recommendation of the CIT Director or at the request of IDTG members.

IT Standards, Guidelines and Playbooks

In addition to the IT architecture, the City should develop guidelines (also known as playbooks) that help staff and management execute effectively.

The playbooks should codify how technology initiatives should be approached, allowing for the delegation and empowerment of project teams and staff. It will be the responsibility of the CIT Director and Managers in the CIT Division – with input from IT and business unit staff – to develop these playbooks. There are many good examples from other municipalities that the City will be able to re-use.

Examples of playbooks and guidelines that other municipalities have developed and that would benefit the City include:

- Tools for project teams.
    - Project management playbook – guidelines for projects, roles, responsibilities, activities and tasks, templates and resources.
    - Business process design playbook – guidelines, tools and templates for designing business processes, using customer journey mapping and other customer-centred design techniques.
    - Change management playbook (ADKAR[5] driven) – guidelines for effectively deploying a change management program in support of a business-technology project, again providing templates and resources for teams.
    - Project training playbook – guidelines for integrating and sustaining consistently high-quality training into projects.
    - Cloud playbook – guidelines, processes and steps required to procure a Cloud-based service.
- Tools for decision-makers and staff
    - IT Service Catalog – services and products that are available from IT, who they are available to, how they are accessed, priced, etc.

Documentation of IT technical standards are important tools to help the IT Team deliver its mandate and comply with policy directives.

IT documentation, though currently adequate where it exists, should be improved by the IT Team. The team should determine where the knowledge base will be managed. At minimum, standards for the following areas should be in place:

- Incident management.
- Change control process management.
- Backup and recovery.

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[5] ADKAR: Awareness, Desire, Knowledge, Ability, Reinforcement, Prosci. ADKAR is a goal-oriented change management model to guide individual and organizational change, created by Prosci founder Jeff Hiatt

- Problem management.

- Security management.

- Configuration management of critical systems.

4.2.3   Processes and Methods

One of the key areas for operational improvement at the City is in project selection and management.

More deliberately selecting technology projects – based on actual available capacity – will ensure a manageable workload, achievable goals and successful project outcomes.

Project Intake / Selection

Before a project can be approved, due diligence is required. Thus, a project should move through multiple stages before being approved for scheduling and execution.

A newly proposed Delivery Team within the CIT Division will be responsible for maintaining a register of all ideas and concepts alongside the technology project portfolio report shown later. This information will be made available live to IDTG members and staff.

The three stages of review – **Idea, Concept, Project** – are described in the following sections.

1. Idea	2. Concept	3. Project
Someone (staff, manager, director) has an idea or a business problem that needs to be solved – likely using technology. The idea should be discussed (with IT and business units involved), explored and fully understood before a decision is made to move forward. If upon investigation the idea / opportunity is valid, then it will move to the concept stage. If not, the idea will be dropped.	Once an idea has been validated, the concept is fleshed out in more detail and a concept / proposal developed. The concept is reviewed by key stakeholders, evaluated using agreed criteria and proposed forward to the relevant governance group for approval to move forward.	A project is an approved and funded concept, that is ready to be executed. A project does not begin until the required resources are available, assembled and ready to go.

Figure 19: Idea – Concept – Project Process

The Idea Development Stage

The *Idea* part of the process is designed to ensure that project ideas are properly thought through before they become fully funded and committed projects.

It is unashamedly intended to slow the idea process down to ensure an appropriate degree of exploration and development. During this stage, a team of CIT and divisional staff will consider business needs, determine potential stakeholders, and consider options and implications of implementation.

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The Concept Development Stage

If the *Idea* is deemed to be a valid opportunity to pursue, the team (CIT and divisional partnership(s)) proceeds to the **Concept** stage where a more detailed project proposal is developed.

Further research about approaches, solutions, resource demands and funding needs is conducted. Once the research is complete and the idea is more completely understood, a project proposal is prepared.

Projects deemed to be large projects will require a business case and resourcing plan to be prepared to accompany the project proposal. If appropriate, the relevant Program Committee should review the project proposal.

It is important to note that, in the past, availability of resources (in the business units and in CIT) has been the most significant impediment to the City's success in implementing initiatives. It is critical, therefore, to identify and secure the commitment of resources (department and IT staff, contract and secondment and backfill), at the GM level <u>before</u> a concept becomes a project.

The Delivery Team will work with the Project Sponsor to prepare an evaluation of the project proposal and rank according to the ranking scheme agreed by IDTG.

If funding is required as part of the annual capital project request process, all proposals will first need to be evaluated and ranked by the Delivery Team. The Delivery Team will also conduct a capacity management review (resource availability and/or needs) and make recommendations to IDTG on the project priorities.

IDTG will use this information to support its decisions about which proposals should go forward as part of the IT annual capital budget.

The Project Stage

Once a proposal has been approved (funded and resourced), a **Project** can be scheduled.

Note that approval and funding of a project does *not* mean that the project will begin immediately. The Delivery Team – working with the IDTG, CIT Director and stakeholders, will schedule projects in consideration of resource availability, dependencies and other factors.

Balancing the Portfolio: Run, Grow, Transform

Just as one balances an investment portfolio, the City should seek to balance its technology investment portfolio.

In the intake process, initiatives should be identified by the following categories:

- **Run** – Activities or investments required to keep existing City technology and business services running / operational.

    If IT budgets need to be trimmed, cuts should *not* come from Run initiatives.

- **Grow** – Activities or investments that provide for expansion of technology, additions to existing technology capabilities or service capabilities or to

accommodate growth of services.

Grow initiatives are usually not as mission critical as Run initiatives and often have some time flexibility, which makes them good candidates for starting early when funding is available or deferring when it's not.

- **Transform** – Activities or investments that involve major changes that introduce new organizational capabilities or fundamental changes to business processes and service delivery.

  When funding is limited, Transform initiatives are typically the first to be cut or deferred unless they are associated with key strategic initiatives. The City should, however, ensure that sufficient funds are allocated to the Transform category as these are the initiatives that will deliver high returns on investment and can significantly propel the organization forward.

This categorization is a useful guide for making key decisions around budget and project selection, and IDTG should establish and monitor target allocation across these investment categories.

Resource Management

To determine the capacity for technology projects, the City needs to better understand its currently available resources (in CIT and business units) as well as the project effort required for each proposal so that it can select a realistic and achievable number of projects.

This progression from the *Idea* to *Project* proposal stage is designed to provide project teams with more time to develop a thorough understanding of the project resource needs so that the resource needs can be more accurately estimated and planned for prior to project start, rather than hoped for after.

IT will implement a resource management system to record allocated and planned staff time on project and operational work. The value of this data will grow over time.

CIT Management must ensure that this data is complete and consistent as it will be a key tool in matching resource capacity to the proposed project portfolio.

As part of the City's annual Work Plan and budgeting process, Digital Delivery will be responsible for collating the proposed IT project resource needs (departmental and CIT staff) and matching this to available capacity.
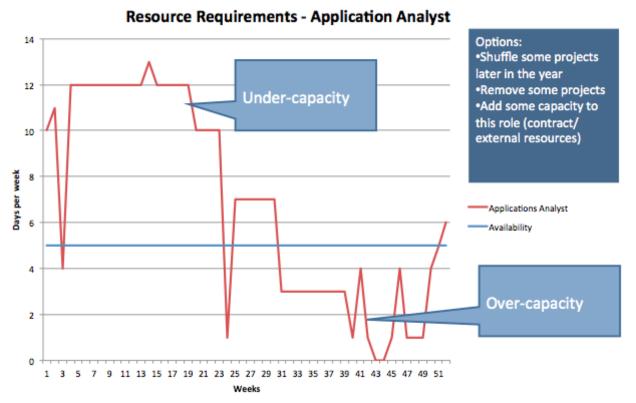
Figure 20: Sample Resource Management Activity

This information will be made available to IDTG to support the evaluation and scheduling of projects and the building of the annual IT capital project plan.

It may necessitate changes to the portfolio or additional funding required to cover additional short-term contract staffing needs to deliver the portfolio.

Project Execution

Selecting the right projects and ensuring that these projects have been carefully thought through is an important step in improving the City's success rate with its IT investments.

But it is only the first step.

Once selected, the projects must be executed successfully if the City is to realize the returns on its investments. Several factors are critical to project success, including:

- Strong project sponsorship and leadership commitment.
- Clear vision.
- A strong Project Manager.
- Sufficient resources dedicated to the project – subject matter, business analysis and technical expertise.
- An empowered project team that can make decisions / drive change.
- A focus on business processes and outcomes over technology implementation.

- A clear change management plan to ensure successful adoption.

Best practices recommend applying a proven project management methodology.

The City should adopt and apply a project management methodology to technology projects. The CIT Division should work with the Corporate Project Support Office to adopt a standard approach.

The Project Management Institute (PMI) PM Body of Knowledge (PMBOK) provides best practices that the City can adopt for its major projects.

This methodology, shown below, defines standard project phases, documentation requirements and checkpoints at the end of each stage to ensure the project is progressing satisfactorily.

Initiation	Definition	Planning	Implement	Close out
•What •Who •Define outcome •Define approach •Obtain commitment	•Project manager •Define governance + organization •Allocate resources •Document project scope •Agreement and buy-in	•Scope •Resource requirements •Budget + schedule •Communications •Risk mgmt •Project controls •Integrated plan	•Kick off •Execute tasks •Monitor •Report •Risk + issue mgmt •Resource mgmt •Stakeholder mgmt •Approve deliverables	•Complete •Handover •Lessons Learnt
Project Assessment	Charter	Project Plan	Project Status Rpt	Close Out Rpt.

Figure 21: Sample Project Methodology Based on PMI Best Practices

The Delivery Team will play an important role in establishing and communicating the methodology throughout the organization and assisting IT and departmental staff in using the methodology to manage projects.

The Delivery Team should also carry out the project checkpoint reviews. These should be treated as a "helping hand" rather than an authoritarian checkpoint process.

For smaller projects, more agile project management techniques may be applied and the City will need to train some of its staff in these approaches.

4.2.4   Measurement and Reporting

Project Portfolio Reporting

The Delivery Team is responsible for reporting on the status of **all** technology portfolio projects (web, digital, GIS, business technology, technology infrastructure) in a way that provides visibility into the projects and provides CIT Management, stakeholders and IDTG with information that can help them intervene when necessary to keep projects on track.

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A sample portfolio report is shown below:

Project Name	% Completion		Target Finish	Priority	Overall Status	Project Key Performance Indicators			
						Budget	Resources	Schedule	Scope
PRM Phase 1		100%	30/06/2018	High	🟢	On Track	Sufficient	On Track	On Track
Maximo evolution phase 1		50%	30/12/2017	High	🟢	On Track	Sufficient	On Track	On Track
ActiveNet implementation		90%	30/09/2017	Medium	🟡	On Track	Sufficient	On Track	Off Track
eScribe Implementation		20%	14/11/2017	High	🔴	On Track	Insufficient	At Risk	On Track
Develop a GIS strategy		80%	21/03/2018	High	🟢	On Track	Sufficient	On Track	On Track
Primary systems integrations		80%	21/12/2019	Low	🟢	On Track	Sufficient	On Track	On Track
Establish Master Data Management strategy		60%	03/03/2018	Low	🟢	On Track	Sufficient	On Track	On Track
Develop IT Risk Management Framework		20%	25/05/2018	Medium	🟢	On Track	Sufficient	On Track	On Track
POS strategy & systems replacement		10%	30/10/2017	Low	🟡	At Risk	Sufficient	On Track	On Track
Future Asset Management systems strategy		10%	30/03/2018	High	🟡	Over Budget	Sufficient	On Track	On Track
Primary systems integrations		0%	21/12/2019	Low	🟢	On Track	Sufficient	On Track	On Track
Establish Master Data Management strategy		100%	03/03/2018	Low	🟢	On Track	Sufficient	On Track	On Track
Develop IT Risk Management Framework		20%	25/05/2018	Medium	🟢	On Track	Sufficient	On Track	On Track
POS strategy & systems replacement		10%	30/10/2017	Low	🟡	At Risk	Sufficient	On Track	On Track
Future Asset Management systems strategy		10%	30/03/2018	High	🟡	Over budget	Sufficient	On Track	On Track
Enterprise Content Management (ECM) Strategy		0%	01/05/2018	High	🟢	On Track	Sufficient	On Track	On Track

Note that this portfolio report only shows the active project view. Other views that show ideas, concepts and project proposals should also be put in place.

While the City can use Excel or SharePoint Online as a starting point for this reporting, it is expected that a project portfolio tracking tool will be required to support portfolio reporting in the medium-term.

As part of the regular review of the IT portfolio, IDTG should focus its review on:

- Prioritization changes.

- Review projects that have a red and yellow status.

- Projects due for completion.

- Projects due for startup.

- Any new unplanned proposals.

Strategy Success Measures

To monitor the execution of this Strategy, a range of success measures / metrics should be tracked and regularly reported to IDTG and Council.

While not all metrics will be available at the start, over the course of the execution of this Strategy the following measures should be established.

A Digital Strategy Performance Dashboard should be established to transparently share progress with all City staff.

Some areas of this performance dashboard are described below.

Digital Strategy

- Current digital maturity level vs. previous year (using Digital Maturity Assessment, could be self-assessed or independently assessed by a third party).

- Completion / in-progress / not-started reporting on Digital Strategy actions.

- Management and staff judgement / opinion about effectiveness of Information, Digital and Technology Governance (via survey).

- Management and staff digital awareness, confidence, comfort (via survey).

- Management and staff confidence in City's ability to deliver digital services and solutions (via survey).

- Average time for project execution from idea to completion.

Digital Workplace

- Ratio of laptop to desktop.

- % of all employees (FT, PT, seasonal) with a City account / access to City communications and collaboration tools.

- % of staff able to work from home.

- % of mobile working staff using technology to manage their day-to-day business processes.

- Annual hours per employee of technology / digital training.

- Number of digital meetings (MS Teams).

Digitized Business Processes

- Number of self-service internal digitized processes available.

- % of digital transactions vs. offline transactions for high-volume internal transactions.

- Number of services that require physical approvals vs. digital approvals.

Digital Infrastructure

- Number of public Wi-Fi sessions – Year/Quarter/Week vs. previous Y/Q/W.

- Multi-year civic facility connectivity.

- % of City's technology estate running Cloud/on-premise vs. previous year.

- # of regional partnership initiatives.

GIS, Data and Analytics

- Number of GIS self-serve solutions vs. previous year.

- Number of master datasets vs. previous year.

- Number of self-serve mapping requests served vs. previous year.

- Number of data literacy training sessions.

Digital Services

- Number of digital services offered by the City.

- Number of digital services that meet our digital standard.

- Number of new digital services this year/Q vs. previous year/Q.

- % of services offered by the City that are available digitally.

- % of digital transactions vs. offline transactions.

- % of digital payments vs. non-digital payments.

- Number of customer accounts.

- % of population with accounts.

- Regularly surveying customers to assess customer satisfaction with our digital services.

CIT Management Measures and Metrics

In addition to the Strategy success measures, a range of CIT Management metrics should also be tracked within CIT (and reported in summary to IDTG) to ensure that the IT service is functioning effectively.

Measures could include:

- Overall IT satisfaction rating (an annual IT survey should be conducted). Current satisfaction rating is below the 80% target. The City should set 85% satisfaction as an initial target.

- The percentage of projects that meet defined milestones / gates within +/-10% of budget and schedule. Results should be collected immediately and the target should be set after the first year.

- Training is a key focus area for the Strategy, therefore tracking and reporting on training hours received by IT and business staff will be important to assess the anticipated upswing in training hours.

- Given the levels of investment in IT, monitoring the IT investment situation is important. An annual calculation of the total cost of IT per employee is a good measure that will allow for ongoing comparison with other organizations.

- Annual comparison of the percentage of work that is Run, Grow, Transform.

- Service Requests.
  - Volumes / trends.
  - Performance against agreed targets and SLAs (which initially will be specific to the service desk).
  - User satisfaction.

- Change Requests.
  - Volumes / trends.
  - Exceptions.
  - Performance against agreed targets and SLAs.

- Asset status should be tracked, including:
  - Age.
  - Health status.
  - Investment by category.
  - Resource use by asset.

- Project portfolio delivery.

- Risk Register.

- Security incidents.

- Financial.
  - Macro indicators – total IT investment by FTE, cost per unit.
  - Micro indicators – budget vs. actuals.

- IT resources.
  - o Availability.
  - o Utilization.
  - o Allocation.

A variety of dashboards can be used to present and visualize this information depending on the audience (see the Palo Alto sample below).

Annual Reporting to the Organization and Council

Building on these base metrics, the CIT Division should also share information that quickly and visually communicates to City staff what has been achieved in the previous year.

It is important that Council and staff better understand how information technology is linked to the effectiveness of the organization. Council must be kept better informed about the overall roadmap and better educated on how specific initiatives will contribute to improved outcomes for customers and for departments.

The CIT Director, through IDTG, should provide an annual report to Council, highlighting cost savings and avoidances, new capabilities, capacities and new service offerings that have been facilitated by technology.

The figure below provides a sample dashboard highlighting IT measures and the data-driven dashboarding envisioned by this Strategy.

Figure 23: IT Value Report Sample

4.3   Technology Funding

To ensure that the City's services are *digitally-powered*, the City needs to make increased investments in technology.

To achieve the Vision presented in this Strategy, the Strategy must be backed with significant and sustained new investment in technology (to support and enable infrastructure upgrades, enhancements and new systems, review of Work Management and GIS systems, updates to AMANDA) and tools (to help the CIT Division manage the technology environment more effectively and proactively) and in permanent and project staffing, research tools and skills development.

The roadmap presented in the [Organizing for Success](#) section assumes funding for the initiatives it lists. If sufficient funding and resourcing are not allocated by the City, the Vision is likely to be unachievable and the initiatives identified within the Strategy will not be delivered in the timeframes identified or, in some cases, not at all.

4.3.1   Consolidate Technology Expenditure Oversight

It has been noted earlier and in previous reports that the City's spending on technology is below industry averages. The City should continue to monitor spending ratios (using MBN and other benchmarks). It is also noted that today, the City's technology budgets are somewhat distributed; most technology expenditure occurs in the CIT Division, but some occurs in departments.

It is recommended that IDTG takes on oversight of all technology expenditures and that the CIT Director work with Financial Services to conduct a review of City spending, tagging all technology expenditures to ensure that the total technology expenditures by the City is known and can be effectively monitored by IDTG going forward.

The City must ensure that the operating budget impacts of technology initiatives are more clearly identified and budgeted as part of capital requests for projects – particularly ongoing staffing requirements – to sustain implemented solutions.

Implementation should not proceed until the resources needed to support the operation of a solution after implementation can be committed.

The City must also work to establish a long-term lifecycle capital funding plan (10-20 years) for major technology components. For example, major platforms (SAP, AMANDA, Hansen, Microsoft 365) have a lifecycle (between 10-20 years), and the City should have funding plans in place to review and replace systems based on those timeframes.

4.3.2 Build ROI into Opportunity Intake Process

It is challenging to build a business case for the Digital Strategy as a whole, thus the Strategy does not attempt to present one.

As described throughout, the City lags behind its peers and many opportunities exist to close service gaps that other communities have already addressed. These are not "nice to have" features – they are standards that the City does not yet meet.

However, individual business cases can certainly be made for many of the proposed initiatives. Many of these business cases will focus on using technology to reduce processing times and improve customer service, to slow the need to add staff to deal with City growth and to eliminate manual or duplicated work.

The City should require technology projects to present a clear business case (as part of the intake process), with clearly defined value and costs before a decision to approve is taken.

4.3.3 Explore New Funding Sources for Technology

To facilitate the increased investment and ongoing support of technology, the City should also look to alternative funding sources outside of the traditional IT funding envelope.

It is in the ongoing operations of technology that the City faces the toughest challenge. For every new technology implemented, new demands are placed on the organization to support and maintain that technology.

The City should continue to explore a range of alternative funding sources, successfully used by other municipalities to support technology investments. These include:

- **Development Charges** – Supporting technology investments related to growth, e.g., Fire mobile technology, traffic light pre-emption, public Wi-Fi provision. Note, the City of Vaughan has made changes in its Official Plan to address the need for and enable public Wi-Fi in City facilities.

- **Building Permit Reserve** – Used to directly fund permitting technology and indirectly fund upstream and downstream technologies and process improvements that contribute to an improved permitting process, e.g., planning application processing technology.

- **Gas Tax** – Used to fund technology projects related to Asset Management, e.g., City of Waterloo received an FCM award for investing over $700,000 of gas tax funds into its Asset Management systems.

- **Departmentally Funded Technology and Resources** – E.g., in Burlington, additional corporate IT staff have been paid for from the Fire budget, providing additional resources to support Fire but the resources are centrally managed and coordinated.

- **Grants and Challenges** – E.g., Smart City Challenge, FCM Asset Management, Community Improvement.

- **Growing Revenues to Offset Technology Costs** – E.g., advertising linked to digital services.

- **Services Surcharges** (specifically on B2B services) – To fund implementation of digital services, e.g., building permit or planning application "surcharge" diverted to a fund to support the implementation of digital services that reduces costs for those using the service (e.g., through reduced plan printing and visits to City Hall).

- **Technology Levy –** Some municipalities have introduced a levy to fund investment in community technology, e.g., the Town of Caledon has introduced a "broadband levy" to address improved internet services in their community[6].

As the list above highlights, other municipalities are realizing positive new technology-powered outcomes for their residents while finding ways to fund them so that the solutions can be sustained.

4.3.4   Capital to Operating Cost Transition

Another major change that will have an impact on the City's technology budgets: technology expenses are beginning to shift from capital to operating budgets.

In recent years, the technology industry has rapidly moved from a "buy" to a "rent" model. As Cloud services have popularized subscriptions, almost all IT software and services are now shifting to a subscription basis and there is now no denying that this is the new business model.

This has the benefit to the City of lowering up-front capital investments in getting technology up and running, but it shifts costs to ongoing operating budgets and a potentially higher total cost of ownership.

The City must prepare financially for IT operating expenses to increase significantly as subscription fees increase as a proportion of overall IT costs.

Capital funding will still be required to support project implementations (professional services, staffing), hardware and other technology procurement, but it is reasonable to assume that all software expenditures will gradually transition to subscription and thus operating accounts over the next 5 years.

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[6] https://www.caledon.ca/en/business/Internet.asp#broadband

5.0   Organizing for Success

The City must be positioned to deliver on the Strategy, otherwise the great ideas represented here will not be realized.

As the benchmarking presented earlier in the report indicated, the City is under-invested in IT and in IT staffing compared to peers.

The IT organization itself has not changed in size in over two decades. It should not, therefore, be surprising that there is a need to add resources to the team to support the delivery of the Digital Strategy, and a need to re-align the organizational structure.

Furthermore, as pointed out in the current state section above, there has been a lack of clarity regarding roles and responsibilities between the CIT Division and departments which has created confusion, duplication, and divergent strategic directions.

Both issues are significantly inhibiting the City's ability to innovate which, in turn, directly impacts service delivery and the City's ability to achieve *the best use of technology*.

As recommended by the PSR, this Strategy aims to resolve these issues and provide clarity regarding roles and responsibilities – identifying the **Who** of the Strategy.

5.1   Change in Approach

The whole Strategy outlines a new approach to technology – the Vision – the thinking about the role technology plays, which in turn dictates a new approach to technology management.

This should be characterized by the following:

5.1.1   Elevating IT in the Organization

The role of technology in 2021 is very different to that of the past. Information, data, technology and digital should underpin everything the City does going forward.

Thus, being effective at identifying, implementing, and embracing digital capabilities must become a strategic, core competency that the City must cultivate and develop.

As a result, it is not acceptable for service owners, managers, and staff to profess an ignorance or a disinterest in technology. Technology will increasingly become how services are delivered, and with a preference for digital delivery at the City, it is no longer optional to digitize services – it is a requirement.

Each service owner must work with CIT partners to get there.

As an organization, the City 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.

5.1.2 Recommending a Centralized IT Approach

For some time, there has been some debate about what CIT's responsibilities should be, and what business units' responsibilities should be. Should technology resources be embedded into business units, or should they be based in CIT?

As noted earlier in the IT Operating Model section, without a formal model in place, an ad hoc and variable approach, department by department has led to a few technology resources operating outside of the CIT Division.

There are two predominant models of resourcing IT in organizations, along with variations thereof – a Centralized Model and a Decentralized Model. Each have their own pros and cons as outlined in the table below.

Table 6: Pros and Cons of Centralized and Decentralized Resourcing Models

	Pros	Cons
Centralized Approach	• Efficiency • Coordination • Standardization • Consolidation • Shared IT vision • Economies of scale • Cost controls/containment • Reduced redundancies • Management and staffing efficiencies	• Can be slower to deliver • Requires compromise across business units • Corporate service can be more distant from the business – lack of understanding of needs
Decentralized Approach	• Local decision-making • Promotes local innovation • Less bureaucracy • Focus on local priorities • Better knowledge of "the business" • Speed to solution – *illusion of speed* • Projects don't move at lowest common denominator pace	• Typically, more expensive to operate • Tools don't scale well • Standalone solutions • Overlap and duplication of technology and efforts • Lack of integration with enterprise solutions • Lack of documentation, testing, backup, DR, security

Each approach, and variations thereof, are suited to different scenarios and situations.

To be clear, the City does not formally operate either of these models today; instead, there is a grey area where there is variability between departments, divisions and teams and a lack of clarity.

In Thunder Bay's case, we believe that a centralized approach to core IT management is more suitable for the current state and goals laid out in this Strategy.

The chart below illustrates the consulting team's view that decentralization of technology services is well suited to situations where technology maturity is high, and where local innovation is a priority.
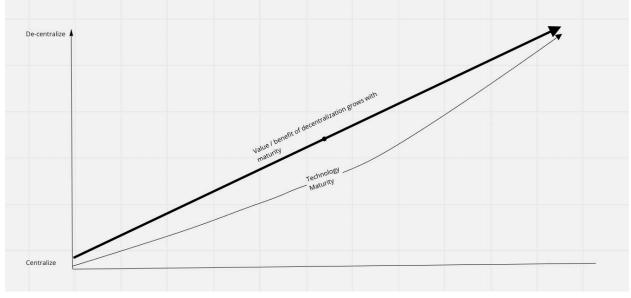

Figure 24: Decentralized – Benefits Grow with Maturity

The City's technology maturity is currently low and thus, a decentralized approach is *not* the right one.

Given the low level of IT and digital maturity at the City and the gaps in digitization of core business process, a more centralized approach that can focus resources on a smaller number of major platforms and can establish the corporate foundations is, in our view, the most appropriate and recommended model.

We acknowledge that this will sacrifice some local speed and innovation – but this is a required trade-off for a focus on high priority, high value corporate efforts that will have broad and far-reaching impacts on efficiency and service.
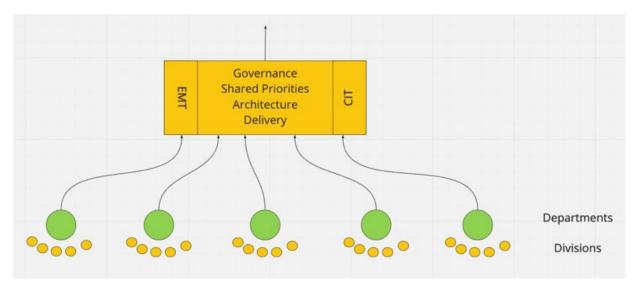
Figure 25: Centralized – More Focused for Less Technological Mature Organizations

Unequivocally, this Strategy recommends that a more centralized approach to IT resourcing is the most effective, efficient and right approach for an organization the size of Thunder Bay. Simply put, with the limited number of resources that Thunder Bay can allocate to technology, having them working together adds more value than working separately.

This should not be interpreted as meaning that departments, divisions, and teams should be any less involved in technology and business technology projects – in fact, the expectation, as we will discuss further in the next section, is to the contrary – that they will be more involved than ever.

5.1.3   Partnerships Between IT and Business Units

The CIT Division has been treated by a large part of the organization as a back-office, reactive, support function – a utility provider charged with keeping the lights on, or a supplier delivering widgets (in the form of projects handed to them).

A utility or supplier type relationship misses opportunities for both sides to learn from each other, to achieve the type of transformation envisaged, and to advance strategically.
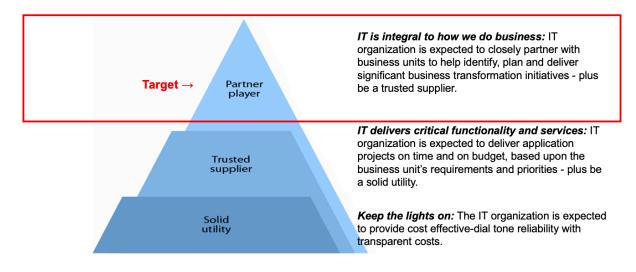
Figure 26: Elevating the Role of CIT

A more modern approach to the role of IT is to focus on building strong partnerships between IT and business units; where IT works hand-in-hand with business units to define and build modernized business processes and services, and where the CIT Division and the application of technology becomes an engine of change and transformation.

To build an effective partnership, IT and business units must both be at the table together in a collaborative mode with a clear understanding of roles and responsibilities. IT should be a partner in advising business units on technology strategy, helping to realize ideas and opportunities; business units should partner with IT by consulting and taking input and advice from IT.

CIT and business units should actively work on strengthening their relationships so that CIT better understands the business and vice versa. Of course, partnerships are built on trust so CIT must continue to deliver high-quality core IT services and business units must consult with CIT.

5.1.4 Stronger and Strategic IT Leadership

As a result of the growing importance of technology, IT cannot operate as a back-office support function.

Instead, IT needs to become a strategic function that has the power to transform service delivery to make experiences better for customers, to help staff be more efficient and effective and help the City do more with less.

Because of this, leading municipalities are recognizing the importance of technology and are elevating the role of IT in their organizations – with Chief Information Officers and Directors of IT becoming part of the Leadership Team with a mandate to drive digital innovation through their organizations.

The suggestion is for Thunder Bay to follow the same approach, with IT Leadership to have the authority and accountability to manage the strategies, working with the City's leaders in partnership with and through IDTG to achieve the Vision.

In addition, in new areas (such as project management, architecture, data analytics, business intelligence) and in existing areas where leadership was not previously focused (such as GIS) the CIT Division must step up, take stronger ownership, and drive these programs.

5.1.5   Increased Focus on High Value Activities

With the support of the Governance Framework, the intent is for the City's leaders and the CIT Division to identify those initiatives that will deliver the highest value to the organization and best align with corporate strategic goals and objectives.

The outcome will be that CIT will work on fewer projects than in the past. A smaller number perhaps, but those projects that are undertaken will be executed well and will deliver the desired outcomes.

5.1.6   Modernized Employee Experiences

The goal, as an employer of choice in the City, is to offer modern technology experiences to employees, providing the tools and technologies that make day-to-day interactions with colleagues, peers, customers and between divisions and departments easier and simpler.

It is with this intent that the new operating and organization model has been developed.

5.1.7   Increased Investment in Information, Technology and Digital Staffing

The recommendations made here are predicated on allocating increased resourcing to the CIT Division.

As identified in the MBN metrics comparisons above, and evidenced by the current state assessment, IT resourcing at the City is significantly below industry averages and significantly below where it needs to be to achieve the Vision articulated by the Strategy.

Increased investment in technology staffing is a must.

Based on the history of under-funded technology resourcing (particularly in areas such as Project Management, Architecture, Business Analysis, GIS and Data and Analytics) there are simply too many gaps in areas that are fundamental to the success of the Strategy – and these gaps must be addressed.

What is IT Architecture?

In the context of building a city, to effectively manage development and building and to ensure safe buildings that fit into local environments, the City puts in place:

Plans: Official Plan, secondary plans, zoning by-laws to guide development.

Requirements: Policies (e.g., minimum setbacks) and meets prescribed development standards (e.g., pipe materials and sizes).

Process: A process to go through for those proposing to build. The planning process ensures that the City can confirm its understanding of the proposal, that the community can provide feedback and to ensure that the proposal complies with the requirements set out.

The IT environment requires similar elements:

Plans: Digital Strategy, Information Management Strategy, GIS Strategy, systems and solutions roadmaps – these establish a broad understanding of trajectory and direction and a framework within which to consider new ideas and opportunities.

Requirements: Policies (e.g., security policy) standards and requirements (e.g., encryption, technology standards – SQL Server, etc.).

Process: The project intake process brings new ideas in through a single process and ensures that qualified City IT staff can review technology ideas and proposals to help align them with the City's chosen directions and to ensure that they meet the City's standards (e.g., data security requirements).

This collectively is known and referred to as "IT architecture".

5.2   New IT Organization Structure

Following industry best practices (Information Technology Infrastructure Library (ITIL), COBIT), and addressing key gaps and organizational concerns, the functional organization structure identified in the Functional Model table shown below is recommended to better organize and align roles and responsibilities and better position the City to support the delivery of the Vision and Strategy.

The Current State Assessment identified that technology roles and responsibilities have not been sufficiently clear, leading to confusion and in some cases conflict.

Clear responsibilities – with a single point of accountability – underpins the City's broader organization design efforts and this core principle has guided the re-design and proposed re-organization of the City's IT resources.

The consulting team recommends that the City pursue a more centralized model for IT staffing at this time. A centralized model is recommended as a more effective approach, that allows resources to be more effectively coordinated and allocated to strategic goals and priorities under the direction of the previously mentioned IDTG.

5.2.1 Functional Model

IT Director	• Technology, Digital and Smart City strategy & planning • Corporate and IT performance measurement and reporting • IT service management • IT financial management (budgeting) • IT Business Relationship Management (following a consistent framework the Director, and the Managers shall be specifically assigned as BRM partners with all Divisions)	• IT Governance • Policy and standards • Risk and compliance management • Vendor & contract management • Strategic Communications • Technology Training and Education program coordination	**Departments** • Systems power users and SME's • Understanding of systems capabilities (and developing capabilities) • Aligning solutions to business needs

Client Services	Technology	Business Solutions	GIS	Delivery	Data	Digital	Departments (cont.)
• Responsible for the Service desk (per ITIL) • Incident Management - 1st level technical support (including knowledge base management) • Identity Management - User account management (AD and systems) (creation, deactivation, group membership) • Request Fulfillment - for standard services including: • Productivity software support, • Device (PC, laptop, tablet, phone) and peripheral (scanner, printer, etc), • Software access provision and package deployment, • A/V support, • Mobility support, • Asset management, license management, inventory, procurement incl. fulfillment and onboarding • Service catalog management • Operational Communications • Customer satisfaction surveys *Roles:* *Service Desk Technician* *Service Desk Analyst*	• Responsible for Technical Management (per ITIL) (Infrastructure design, build/ acquire, test, operate and discontinue). • Responsible for the following CTB infrastructure portfolio (of IT services): • Technology architecture (including standards and roadmap) • Network (WAN, LAN, Wi-Fi) Telephony, mail, messaging, unified communications • File and print infrastructure, • Computing platforms (including servers, workstation, tablets, etc.), • remote access and mobility technology, • Cloud infrastructure solutions, • Security defense (e.g. firewall, IPS, a/v, malware, spam), • Data Centre • For the services above provide: • 2nd and 3rd level Incident and Request Fulfillment support, • Problem Management, • Supplier Management, • Financial Management, • Capacity and Availability Management, • Security Management, • Service Asset and Configuration Management, • Change Management, • Backup and restore management • DR operation (IT Service Continuity Management) • Service / performance monitoring *Roles:* *Technology Analyst* *Network Analyst* *Security Analyst*	• Responsible for Applications Management (per ITIL) (Business Systems design, build/acquire, test, implement, operate and discontinue). • Responsible for the following CTB applications portfolio of IT services: • Solutions architecture (including standards and roadmap) • Enterprise applications, • Expert applications, • In-house applications, • Cloud business solutions, • Systems planning, • Systems integration and middleware (incl. with business partners, customers, and agencies), • For the services above provide: • 2nd and 3rd level Incident and Request Fulfillment support, • Problem Management, • Supplier Management, • Financial Management, • Release and Deployment Management, • Security Management, • Service Asset and Configuration Management, • Change Management, • DBA's *Roles:* *Systems Analyst* *Application Analyst* *Database Analyst*	• Responsible for following GIS portfolio of IT services: • GIS architecture • GIS technology design and management • GIS integration • GIS operations • Enterprise GIS Dashboards, • Enablement of divisional / departmental GIS analytics and reporting, • Integration of GIS and non-GIS information. *Roles:* *GIS Coordinator* *GIS Analyst* *GIS Specialist*	• Architecture & planning coordination • Responsible for the following CTB IT project portfolio of services: • Standardized project life cycle management, • Project portfolio management including intake of projects, • IT resource management and planning, • Monitoring and reporting across the IT project portfolio. • Responsible for IT Business Analysis function which includes: • IT Business Cases, • Business Requirements (including process/data models), • Selection Criteria/Build Specifications, • Test Plans to verify user requirements, • 2nd and 3rd level Incident and Request Fulfillment support, • Enablement of Departmental power users. *Roles:* *Architect* *Delivery Manager* *Project Manager* *Business Analyst*	• Responsible for following Business Intelligence (BI) portfolio of services: • Data architecture (including standards and roadmap) • BI framework, • Data warehouse management, • Master Data Management, • Enterprise Dashboards, • Enablement of divisional/depart mental analytics and reporting. *Roles:* *Data PM / Product Manager* *Data Engineer* *Data Analyst*	• Web • Portal • Forms • Web app integration to website • UX standards • Digital solutions *Roles:* *Web Analyst* *Web Developer* **Communications** • Brand / look and feel • Web Content / Content Standards • Social media • Community Engagement *Roles:* *Content specialist* *Digital Media Specialist*	• Business process ownership, design and re-design • Leading adoption, training and change management programs • Data stewardship, data management and data editing activities • Simple solution configuration & end-user workflow configuration • Data analysis, analytics and reporting • GIS exploitation / utilization • Participation in vendor relationship management in partnership • Active project accountability, leadership and resourcing • Coding & development work, systems design and architecture, IT infrastructure procurement and management, cyber security management should not as a rule occur in departments, excluding formally agreed exceptions Roles: Sponsor SME Process Manager Coordinator Data or GIS Analyst Business Improvement Specialist

Figure 27: Functional Model to Organize and Align Roles and Responsibilities

In support of the functional model, the following represents the recommended role split between the CIT Division and departments.

Department Roles and Responsibilities

Departments need staff and management to:

- Be strong digital service owners, with intent to offer services built for the 21st century.
- Own business and operating models, business processes, their design and re-design.
- Be curious and open to change.
- Have a good knowledge of existing systems capabilities (and emerging / changing / growing capabilities and opportunities).
- Have a good knowledge of target process, data, systems, integration and technology architectures.
- Partner with CIT early to ideate, conceptualize and propose initiatives (new, changes to existing).
- Lead some projects (according to an agreed IT project methodology) and provide project status reporting.
- Bring active accountability, leadership and resourcing to digital initiatives.
- Bring strong, highly experienced subject matter expertise to digital initiatives.
- Work, in partnership with CIT as well as vendors and partners, to design and implement digital solutions.
- Lead adoption, training and change management programs of business specific solutions.
- Ensure systems power users and subject matter expertise is assigned and maintained.
- Conduct basic/simple solution configuration (e.g., drop downs, reports, data extracts, process steps and end user workflow configuration).
- Be effective data managers and stewards, to be responsible for data production and consumption activities.
- Conduct data analysis, analytics and reporting.
- Fully use and exploit GIS platform and GIS solutions.
- Actively participate in vendor relationship management in partnership with CIT.

Departments need to be aware that:

- User account management, architecture, coding and development work, systems integration, server-side configuration, hardware procurement and network design and/or management should not, as a rule, occur in departments,

excluding formally agreed – through IDT Governance – exceptions (e.g., SCADA). Note, this applies to all solutions and services that manage City data, regardless of hosting (Cloud, partner, on-premise).

- Technology solutions procurement should also not occur in departments without partnership and involvement of CIT in the process.

- All technology and services used by the City are subject to the same, consistent, corporately-defined security requirements and testing programs.

CIT Roles and Responsibilities

CIT need staff and management to:

- Advocate, evangelize and advise EMT and divisional leaders on digital opportunities and needed digital capabilities.

- Understand service owners' business goals, objectives and help business units identify needs, build business cases and fully realize their service improvement ambitions through technology.

- Work with the organization to govern the pipeline of opportunities and help the organization select investment opportunities that will have the largest impact.

- Provide project management guidelines and services to manage the delivery of digital service improvements in partnership with business units.

- Provide high-quality and effective IT support and assistance, enabling self-service for commoditized IT services.

- Manage core technology to be reliable, flexible and agile which is positioned to anticipate change and able to rapidly adjust to changing needs.

- Be open to change and evolution of technology needs and provide technology and capabilities that enable modern and efficient ways of working.

- Work with partners to develop clear standards, policies and guidelines that can enable quick and repeatable decision-making.

- Provide architecture, design and integration services to ensure systems and service integration.

- Work with partners to plan, implement, configure, integrate, upgrade and support business solutions.

- Lead and manage corporate GIS, data and digital programs.

- Implement and oversee suitable security programs for all City technology.

CIT needs to be aware that:

- Democratization of systems (e.g., GIS, teams, data and analytics, reporting, etc.) is a key objective so, where possible, we should be enabling staff in departments to do their work using tools without requiring CIT assistance or intervention.

- Business goals and objectives – along with business models, business processes and services – are owned by divisions and, specifically, service owners.

- Change management and training are the domain of departments for departmental systems – CIT is responsible for enterprise-wide systems change management and training (e.g., Microsoft 365).

5.2.2   Key Changes from Current State

The key changes envisioned include:

- Both CIT Division and non-IT department roles and responsibilities defining how they will partner to deliver technology.

- Clear internal delineation of roles and responsibilities with the CIT Division.

- Clearly-defined roles for departmental business unit staff, reflecting their lead role around championing change, owning and designing business processes and supporting change management and adoption.

- Increased emphasis and capacity within the CIT Division on project planning, portfolio management and delivery.

- Increased emphasis and capacity within the CIT Division on developing corporate data, analytics, and GIS capabilities.

- Increased emphasis and capacity within the CIT Division regarding architecture.

- A shift from a 3-unit structure to four functional units within the CIT Division, with the creation of a Delivery Team.
  This is important and has not been recommended lightly.
  We understand that the addition of functional units adds management but the CIT Division needs direction, coordination, and focus and this requires new functional units specifically focused on IT delivery.

5.3 Partnering of Departmental and IT Roles and Responsibilities

The critical and central role of management and staff in departments and divisions in the success of technology initiatives and business transformation cannot be overstated.

Service Owners own their service and delivery, in a digital fashion, is the responsibility of the Service Owner.

It is from business areas working in partnership with IT staff that innovative ideas and solutions to business problems emerge.

On business solution projects, the Vision, sponsorship, leadership, process design, change management and subject matter expertise can only come from the business units.

Consistent with the functional model, business process and business improvement specialists (as well as data and GIS analysts) should be expected to be in departments, whether in an innovation team or distributed across divisions. Many divisions will not have these roles in place and will need to rely on local staff or contracted resources.

Regardless of model, staff in departments and divisions will work on requirements and will, in turn, work closely with staff in the CIT Division, using the defined governance processes for project work that meets suitable thresholds.

Power users of business solutions, staff with non-technical operational duties who have developed expertise and experience with heavily-used business solutions, are also expected to operate in divisions or across divisions. They may provide support and training to staff and may carry out simple solution configuration work.

Furthermore, in areas such as GIS, data analytics, dashboards, digital forms and enterprise content management, the intent is for the CIT Division to provide tools that empower divisions to take advantage of technologies – without IT's involvement.

It is also recognized, expected, and encouraged that all divisions will hire smart, capable and tech savvy individuals into roles in their teams. These staff should be empowered to innovate but will be expected to work transparently and openly with their business partners in IT to align their work and to operate within the Governance Framework.

Deep technology expertise and work – around architecture, technology strategy, technology standards setting, project and portfolio management, business analysis, enterprise systems management, upgrades, integration, development and solution procurement – should be driven from the CIT Division. In accordance with audit best practices, administration of application security for business solutions (including on-premise and Cloud-based solutions) should be the responsibility of the CIT Division.

All existing roles – with some aspect of technology responsibilities that fall within the domain of IT in the functional organization chart (e.g., ERP team, web administrators) – should be reviewed and the relevant responsibilities and roles transferred to the CIT Division.

In future, for any <u>new</u> or <u>re-designed</u> job roles created by departments and divisions whose job descriptions include direct technology responsibilities (beyond the usual tech savviness requirements for new employees), it would be valuable to work with CIT to ensure that roles and responsibilities are clear and the operating model followed.

It is recommended that HR facilitate a review of such roles with the CIT Director to ensure that alignment to the functional model is maintained.

Under the business partnership model envisaged by the Strategy, it would be a recommended practice that when a department is recruiting to a role that involves or interacts with the technology division (e.g., a data analyst or a systems subject matter expert), that they would communicate with and involve CIT in the process, for example, by actively involving CIT Management in the recruitment process.

5.3.1   Governance Support for Partnership

Governance has been previously mentioned as being key to setting direction, monitoring progress, and evaluating outcomes.

Governance will also promote and manage the partnership between CIT and business units since it will provide cross-organizational oversight of technology activities, providing guidance and direction both to the CIT Division and to non-IT departments.

5.3.2   Project Partnership Model Example

In the partnership model and following the functional roles and responsibilities, there are clear roles and responsibilities set out for business units regarding technology.

In the example below (related to the Land and Property Management System (LPMS) implementation) the roles and responsibilities of the department and IT are shown.

This illustrates a consistent model that will be applied for all business technology projects going forward.

Table 7: Roles and Responsibilities of an IT Department

An Example: New Systems Project
<u>Departments Provide</u>: • Active Ownership and Project Sponsorship • Subject Matter Experts – seconded to the project to understand systems capabilities, review current and design future business processes • Testing and sign-off on functionality • Providing initial and ongoing training of staff on LPMS system and supporting adoption • Change Management – w/ focus on reinforcement + enforcement to ensure successful adoption

An Example: New Systems Project

IT Provides:

- Project Manager – dedicated to project, providing project leadership
- Business Analyst(s) – providing business analysis and business process analysis needs
- Application Analyst(s) – providing application configuration and integration needs
- Architect – reviewing and designing data and integration needs
- Change Management – providing frameworks and tools to assist business unit

5.4 Enterprise and Expert Systems and Associated Roles and Responsibilities

It is important to recognize that the City uses over 300 business systems today.

While the overall emphasis is on standardization and consolidation of those systems to as few as possible, there will always be departments with unique requirements, e.g., Cemetery Management (StoneOrchard) or Traffic Planning (TES), that will require specialist systems. Inevitably, there will always be a plethora of systems.

As it is impossible for the CIT Division to provide the same level of support to all these applications, systems are classified into two main types – enterprise and expert.

To assure efficient and appropriate levels of support for these two system types, the City should employ different CIT Division and department roles and responsibilities for each of these types, shifting some IT tasks to vendors as explained below.

5.4.1 Enterprise Systems

These systems have the following characteristics:

- Major top tier software **platforms**.
- Used across whole / most of the organization.
- Generic capabilities accommodate multiple lines of business and re-use.
- Highly configurable (data, workflow, validation).
- Significant integration requirements.
- API tools, query tools.

The City's enterprise systems are expected to include (note that several enterprise systems are not yet in place, indicated with "TBD" below):

- SAP – Enterprise Resource Planning
- ESRI – GIS
- Hansen – Work and Asset Management (to be reviewed)

- AMANDA – LPMS

- eSolutions – Web and Digital Platform

- TBD – Business Intelligence and Data Platform

- TBD – CRM

- TBD – ECM

The CIT Division plays a stronger lead role for these systems by:

- Functioning in partnership with the business leads for implementation and utilization of enterprise-wide capabilities.

- Fully supporting and evolving the solution to meet corporate needs.

- Managing vendor relationships.

5.4.2   Expert Systems

These systems have the following characteristics:

- Specialized solutions.

- Targeted for specific industry.

- Use limited to teams and workgroups, though role may be critical to the organization (e.g., Tax).

- Typically, fewer enterprise integration requirements or options.

- Fewer generic and configurable capabilities.

Examples of these systems include:

- Firehouse.

- StoneOrchard.

- iMedic.

- Medicare.

- Vailtech.

The CIT Division typically plays a reduced role regarding these systems by:

- Working with business units to assist in procurement (in line with architecture and standards) and ensuring suitable support is put in place as part of the procurement.

- Supporting the installation of software and ensuring environment is correctly configured for operation.

- Supporting integration requirements as necessary.

- Coordinating, as necessary, with departments that work with vendors to support the solution.

- Possibly negotiating a higher level of support based on the critical nature of the solution (e.g., Tax system).

5.5   Technology Training Model

The lack of attention to technology training and clear allocation of responsibilities was reflected in staff survey results, which indicated dissatisfaction with the technology training offerings.

At this time, accountability for technology training is not as clear as it should be and there are limited resources specifically allocated to it.

It is recommended that the following roles and responsibilities regarding training be followed.

Table 8: Roles and Responsibilities Training

Area	Description	Role / Responsibility
Corporate training needs	The development of a corporate technology training requirements analysis, identifying training needs across the organization.	CIT Director
Technology training program design and development	Development of a training program informed by corporate training needs requirements reflecting the delivery preferences of staff, e.g., Lynda.com, offline, self-study, lunch and learns.	CIT Director
Corporate Training – Standard Productivity Suites	Coordination and delivery of training around productivity suites, e.g., Office, Adobe.	Coordinated by HR in partnership with CIT as part of corporate training program
New technology product	Coordination and delivery of training around new solutions.	Coordinated by project team, following training delivery standard
Business Systems Training	Initial and ongoing training in the use of business systems.	Departmental SMEs with support from vendors and project team members

In addition, the City should ensure that new staff being recruited to the City have requisite technology skills by modernizing job descriptions and ensuring that staff in key roles – such as Directors – have the modern technology and digital skills required to lead digital transformation.

The City should procure / develop a digital education program for organizational leaders and management group designed to help leaders understand the value to be gained from the digital world and how to take advantage of the opportunities it presents in the context of the enterprise.

This may be a good opportunity to work with regional partners.

5.6   Future Information and Technology Staffing Needs

To support the adoption of the Strategy and the implementation of the recommended IT organization structure, a series of changes to existing roles are anticipated with new job descriptions and new reporting relationships within the CIT Division.

Organizational recommendations that identify recommended changes – including realignment of some roles – have been separately provided to the City by the consulting team.

As noted earlier, while there have been fluctuations over the years, the City's CIT Division is the same size as it was two decades ago. There are, as a result, requirements for new staff positions within the CIT Division that simply cannot be deferred or ignored.

One key area of focus, at least initially, is establishing the project delivery engine in CIT so that initiatives and projects that are selected can be executed effectively and can achieve the outcomes anticipated.

5.6.1   Short-Term CIT Staff Needs (Within 1 Year)

The following roles are recommended by the consulting team as priority positions for the City in the short-term.

- **Manager, Delivery** – Accountable for Projects, Resource Management, Architecture, Governance, and common project services.

- **GIS and Data Coordinator** – Accountable for all data and GIS standards, tools, and common data services and a recommendation of the recently completed GIS Strategy.

- **Project Manager(s) / Business Analyst(s) –** A combined role accountable for opportunity analysis, business cases and management of program projects. At minimum, 1 permanent position must be added to CIT in the short-term. Others may be added on contract as needed to assist in the delivery of projects.

These roles will support and enable the delivery of 2022 projects as identified in the Roadmap section. A combination of internal FTE reallocations and operational or capital business cases will be required to fund these roles in 2022.

5.6.2 Mid-Term Information and Technology Staff Needs (1-2 Years)

In the medium-term, the consulting team recommends the following role additions to CIT.

- **Project Manager(s) / Business Analyst(s)** – In the medium-term, at minimum, the City should aim to add two permanent positions in the PM/BA role. Others may be added on contract as needed to assist in the delivery of projects.

- **Application Developer / Analyst(s)** – Accountable for setup, configuration, evolution, integration and support of the City's core systems. At minimum, the City requires two new positions to support digital and business solutions work ahead.

These positions are required to support the delivery of projects identified in 2023 and beyond.

The CIT Director, working with IDTG, should develop a business case and supporting budget requests to address these requirements.

5.6.3 Longer-Term Information and Technology Staff Needs (2-4 Years)

In the longer-term, the consulting team recommends the following role additions to CIT:

- **Data Engineer** – In the longer-term, as the City focuses on data and analytics, additional specialist resources will be required in this domain.

- **Project Manager(s) / Business Analyst(s)** – In the longer-term, at minimum, the City should aim to have three additional permanent positions in the PM/BA role. Others may be added on contract as needed to assist in the delivery of projects.

These positions are required to support the delivery of projects identified in 2024 and beyond. The CIT Director, working through IDTG, should develop the requisite business case and supporting budget requests to address these requirements.

While role additions to CIT may seem significant – extravagant even – remember that there has been 20 years of *no change* to resourcing levels in CIT. There is a lot of catching up to do.

Note also that several other positions identified and suggested by the consulting team – including recommendations for additional change management and training staff, additional GIS and business solutions positions, digital specialists and data experts – have been rejected by City management to minimize the number of positions that must be added.

5.7 Future Departmental Business Unit Staffing Needs

In addition to the CIT Division changes recommended, departmental business unit staffing also needs to change to adopt the Strategy recommended, to operationalize the functional responsibilities articulated in the Functional Model section and to lead the charge to digitize their business services.

Transformation projects will require the allocation and dedication of business unit staff to projects to make them successful. Like CIT, seconding, backfilling, and contracting will be strategies that will need to be funded to enable divisions to resource projects for successful execution.

As well, and as discussed in the [High-Level Summary of the IT and Digital Management State](#) section, it is expected that departments and divisions will need to develop skills and capabilities in the following areas:

- Digital and technology awareness and savviness.
- Systems knowledge and understanding.
- Service design, business process design and business improvement.
- Training, adoption and change management.
- Data analysis.
- GIS use and application.

Some departments have already begun to develop and nurture these skills – others have not yet and will need to develop these skills as projects and initiatives arise that require them.

As departments and divisions review and revise job descriptions, they may have the opportunity to consider how to develop these capabilities within their teams.

It is important to note that Subject Matter Experts and departmental power users are critical to the delivery of business technology projects. They should actively be involved in and seconded to major projects to help design future processes, drive change and ensure successful adoption of solutions.

5.8   Alternative Resourcing Strategies

Ramping up capacity to deliver digital transformation will be critical, however, permanent internal staffing is only one part of the story.

The reality of modern IT – particularly in municipalities – is that it is simply impractical to maintain in-house all the skills and capacity needed to plan, implement and manage the City's increasingly complex technical environment and burgeoning project demands.

To do so would be unaffordable or, in the case of a short-term need, a bad business decision.

Smart IT organizations approach this challenge by relying on a team of in-house IT staff with strong internal connections and understanding of the organization's business needs who, in turn, work with a network of trusted partners, vendors and solution and service providers to deliver the required services.

Just as the City approaches road building and road maintenance – contracting engineering and construction firms with road design and building expertise – in some situations, IT can adopt the same approach with the emphasis on "getting projects

done", or "project throughput" rather than on IT staff necessarily implementing the technology themselves.

This is a hybrid model of IT service delivery, that combines internal IT and business skills with market-based expertise and services. It means that the CIT Division, the CIT Director and CIT Managers, act as coordinators or orchestrators of IT service delivery, executed by a combination of internal and external providers.

The City's goal should be to increase speed, agility, and project throughput by using the right mix of resources and skills for the job at hand.

Several approaches are common in municipalities for augmenting internal IT resources. Some of these same approaches can also be applied to filling resource gaps in business units.

5.8.1   Capital Funding Contract Staff Positions

All evidence and studies indicate that projects are more successful when staff can be dedicated to the project.

To achieve this level of dedicated attention to projects, municipalities commonly use contracting for short-term staff (6 month, 1, 2 or 3-year contracts).

Costs for staffing contracts are "bundled" into the total capital cost of the project and capitalized so, when projects are approved, the appropriate staffing is also approved.

Contracted staff needs may include technology resources such as a Project Manager, Business Analyst(s), Application Analyst(s), as well as business unit staffing to provide subject matter expertise from departments to drive and support project delivery.

Taking advantage of the City's new found ability to work remotely means that the City can seek staff with expertise from across Canada – not just locally.

Contracted staff may be used directly on the project but are more often used to backfill Subject Matter Experts in business units or IT, thus freeing up expert and experienced internal staff to work on projects.

For example, a contract Traffic Engineer may be brought into the City on a one-year contract to free one of the City's current Traffic Engineering staff to work on the Traffic Management System project.

This allows the City to retain the accrued project learning and expertise when the project is complete and to offer development opportunities to internal staff.

5.8.2   Vendor of Record (VOR) – IT Resources On-Demand

Because of the regular need to bring in additional resources to support project activity, numerous municipalities (e.g., Richmond Hill, Guelph, Mississauga, Hamilton, Peel) have embraced a VOR or Roster model.

In this approach, the City would have an arrangement with one or more firms that can supply experienced Project Managers, Business Analysts, network or security specialists, GIS experts, AMANDA specialists, and other technical resources to the City, on-demand at pre-set rates.

At Richmond Hill, their arrangement with Deloitte allowed them to access Finance, Procurement, HR and other business specialists from Deloitte to support their business unit resourcing of projects. As noted in this example, this approach may not be confined to technology resources. At Guelph, their Roster model has seen them sign pre-qualified master agreements with 4 vendors that can supply AMANDA configuration services. Now, when a need arises, within a week the City can issue a Statement of Work (SOW) and select a partner to work on the project with City staff.

Funding for VOR resources are also included as part of a project capital request and having a VOR in place can enable the City to quickly ramp up resources to lead major projects such as LPMS, Work Management and CRM.

5.8.3   Service Providers: Out-Task Some IT Services

As the City's technology needs grow, as the City becomes more mobile, as security threats grow exponentially, with the work needed in and around technology architecture and with the growth in Smart City activities, pressure on the Infrastructure Team will grow significantly.

The City has great strength in this team today but the team is already challenged with volume and will become overwhelmed with work if the City isn't smart about how it handles the allocation of work.

Of course, some of the City's IT systems are tailored to a specific municipal line of business, however, many technologies run by the City (such as networks, servers, file storage and email) are more generic.

As hospitals, construction firms, banks and other organizations have come to use the same systems, these areas of IT have become more commoditized. In areas of commoditized service provision, because of their scale, expert service providers in the marketplace can be more cost-effective than internally managing the service. In some situations, using a managed service provider can be attractive to organizations that need to free up internal staff to use their strong knowledge of the City to work on projects.

So, the City can use out-tasking as a strategic approach that trades off low value activities for higher value work, which has more strategic value to the organization, such as architecture, strategy, integration, mobility, project implementation activities.

A few examples:

- Some municipalities have out-tasked device provisioning and hardware maintenance (e.g., the City already does this for printers; others are doing this for telephony services, device provisioning). These external services are used to augment the existing IT resource base.

- The use of hosted or Cloud-based services can out-task many of the infrastructure management activities that would be required for an on-premise solution thus freeing staff to focus on integration, security testing and contract management.

- The City may lack the dedicated expertise or resources to manage a service as effectively as needed by the City. One good example of this is around

specialized security services. These services can also be purchased on an "as needed" basis or – as is becoming more prevalent – as a managed service from outside firms. The City is still receiving the same (or perhaps a higher) level of service, but City IT staff are available to work on other activities. Of course, there is a cost implication here – external services have a cost, but the cost is often less than fully resourcing a function.

Success in the domain of out-tasking, depends on continuous development of City staff skills to enable them to move to value-added activities and effective selection and management of providers, ensuring that contracts are well structured to protect the interests of the City.

Contract and SLA management, for example, would become an area in which the City must develop new skills.

5.8.4   Use External Expertise to Plan, Design and Set Strategies

Setting strategies before tackling projects is critically important to successful outcomes – fully exploring possibilities before diving in is essential.

In this area, there is clear value in engaging experts in the right measure, at the right time. Consultants with deep domain experience and with experience in developing strategy and implementing solutions, can help to guide the City in developing plans that properly leverage systems' capabilities to address business challenges.

Such plans will maximize value for the City over the long-term.

5.8.5   Leverage Strategic Partnerships

Although the CIT Division can design and build great solutions, it doesn't always mean that it's the right or best approach.

Looking forward, more strategic decisions will be needed to determine if the City is equipped to build and deliver a good solution or whether another partner (in the public or private sector) is better suited to address a need.

Public Wi-Fi is a good example of this, with different municipalities taking different approaches and using partnership models. Some municipalities have built and support these public networks.

In contrast, Mississauga has partnered with Sheridan College, due to their expertise in providing Wi-Fi to 21,000 students. Sheridan provides and supports the public wireless Mississauga service. Burlington has partnered with the local telco – Cogeco – which now provides public Wi-Fi in City facilities and in parks and other civic spaces.

In both Mississauga and Burlington, partnerships with organizations with strong, deep expertise have resulted in a superior service for citizens, while City IT resources are able to focus on other areas better suited to their core competencies.

Through Tbaytel, Thunder Bay is in a similar situation to Burlington – able to work with and through a partner to achieve beneficial outcomes for the community.

Given the pressures on IT resources, looking forward, the City should think strategically around other opportunities for partnership as it considers technology opportunities.

In the region, there are a range of potential partners to explore working with more closely, including:

- Tbaytel.
- Synergy North.
- Thunder Bay Libraries.
- Regional Hospital Network.
- Local School Boards.

Working with potential partners in the region to enable piggybacking on purchases, to explore opportunities for joint or shared project implementations, to share resources or run joint training opportunities, to work jointly on digital education programs are all good examples of how the City can gain significant value through strategic partnership.

With a clear description of the who and how, what projects and solutions does the City need to work on?

6.0   Major Initiatives

The following section outlines the **what** of the Strategy – the major projects that are recommended.[7]

The work ahead is broken into the following five workstreams:

1. **Digital Workplace** – Connecting all staff, using technology to make staff working lives simpler and easier.

2. **Digitized Business Processes** – Replacing paper-based, manual processes with automated, digital, real-time, workflow-based processes.

3. **Digital Infrastructure** – Ensuring we have the connectivity, Cloud capabilities and cybersecurity to support the City and our community.

4. **GIS Data and Analytics** – Managing data well and using it to drive our practices and decision-making.

5. **Digital Services** – Providing great, self-serve, digital experiences to customers over visits or calls to City Hall.

These are the areas in which we recommend the City focus its digital and technology investments.

6.1   Digital Workplace

Connecting all staff, using technology to make staff working lives simpler and easier.

6.1.1   Microsoft 365 Implementation

The City is already in the process of upgrading to Microsoft 365 – Microsoft's next generation, Cloud-based collaboration and productivity suite.

For the City, this will mean more broadly deploying MS Teams, migrating email inboxes and calendars to the Cloud for greater resiliency and performance, providing access to staff to new tools for planning and tracking work and tasks, using SharePoint Online and OneDrive to support real-time collaboration, and enabling mobile access to documents and files.

The migration will take a couple of years – as the City must gradually move to a subscription model for licensing – but this move will create a long-term foundation for more flexible and collaborative work inside the City and with partners outside.

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[7] There are more initiatives that the Digital Strategy has identified that are not discussed in detail here. A more complete work plan that includes smaller activities and initiatives has been supplied directly to City staff.

6.1.2 Information Management Strategy and Enterprise Document and Records Management System

The City must modernize its corporate records management (classification, retention, destruction) approach and align its paper and electronic records management practices. An enterprise records management systems project has been planned and partially budgeted for a few years.

While technology will be an important part of making it easier and simpler to find, access and retain critical content, the right strategy, policies, practices and protocols must be in place before implementation to ensure that the City sets up the environment correctly.

As a result, the City plans to develop a Corporate Information Management Strategy that will review the City's current information management practices, set the trajectory, evaluate solution options and provide a clear roadmap and implementation plan for implementing electronic records management and for improving records management practices.

Once the strategy is set, the City will proceed to implement a corporate document and records management system – re-using, where possible, existing technologies (such as Microsoft SharePoint and OneDrive).

6.1.3 Device Review

In the quest to provide a flexible working environment that meets the needs of staff and management, the City plans to conduct a review of the devices that it provides and determine the most effective options – for smartphones, tablets, laptops, and desktops.

Many municipalities have moved to a primarily laptop fleet and/or offered managers and staff choices of the devices that they can use – this is known as the Choose Your Own Device (CYOD) model. The City will evaluate its options and determine what approaches it will use.

A major device replacement program (based on lifecycle) is planned and budgeted for 2023, and so this device review should be completed ahead of this work.

6.1.4 Connecting All Staff

While the City has long focused on providing IT services to City staff in offices, those who don't work in the office, have less access.

Of course, some mobile City staff are issued mobile devices, but many do not receive a device. For those staff who do not work primarily in an office – e.g., paramedics, transit operators, childcare and long-term care staff – it is challenging for the City to get messages out and staff can feel disconnected. Digital communications is forming a more and more important part of any staff Communications Strategy.

As the City becomes more digital and offers new digitally-powered self-service capabilities (timesheets, shift management), providing options that allow *all* staff to access IT resources and self-serve services will become more important.

As a result, the City will evaluate options and approaches to connect those staff to City technology. The City may also want to consider Bring Your Own Device (BYOD) options for staff who are not issued devices.

6.1.5   Expanded IT Support Service

As the City's dependence on technology for service delivery continues to grow – just think about online recreation program registration, mobile work management and mobile building inspectors and enforcement officers – the demand for technology support is expected to continue to grow and grow.

Furthermore, for many service areas, such as Fire, EMS, water and wastewater, support is not just needed during office hours (8:30-430) as the current IT support service is provided but may need to become 24x7x365 or an extended hours service that provides service 7:00am-9.00pm.

A review of out-of-hours IT service needs should be conducted, and options brought forward by the CIT Director to IDTG for consideration.

A suitable option must be selected and implemented.

6.2   Digitized Business Processes

Replacing paper-based, manual processes with automated, digital, real-time, workflow-based processes – with a focus on the City's core business processes.

6.2.1   Asset and Work Management Systems

Asset Management is one of the City's strategic priorities – under the renew banner. The City's asset and work management systems go-forward strategy and path is unclear today.

There are numerous systems in use and there are some questions about whether the City's main Work and Asset Management System (Infor/Hansen) can meet the City's current and future requirements.

At the same time, there are pressing requirements to collect asset information and condition data to meet asset management reporting deadlines, as well as a need to mobilize field staff.

It is recommended that the City implement a series of short-term or interim solutions to support its immediate needs – utilizing GIS and existing solutions in use at the City.

Then, working through the proposed collaborative governance model discussed earlier in this report, and specifically through the Work and Asset Management Systems Coordinating Group, the City should conduct a review of its Asset and Work Management Systems, establish a fulsome understanding of needs, define a target architecture and determine a suitable path forward to establish a robust, integrated and comprehensive set of solutions that leverage GIS, back-office process automation and mobile capabilities.

Once the roadmap is mapped out, it should proceed through the intake process to be budgeted, resourced, and executed.

6.2.2   Land and Property Management Systems (AMANDA)

Growth is another of the City's strategic priorities that the Digital Strategy directly supports.

As part of the consultation process to develop this Strategy, the consulting team and staff from the City's Planning, Building and CIT Divisions met with the development and building community. Representatives indicated a clear desire to interact with the City in a more digital manner, a call also echoed by the Thunder Bay Chamber of Commerce.

So, it is recommended that the City plan to expand its use of the AMANDA system to fully digitize the planning, building, permitting, licensing and enforcement processes.

This work should start with Building and Enforcement and should include:

- Digitizing back-office processes and enabling digital plans review.

- Enabling online interactions with customers allowing them to apply and pay for services online, book an inspection or report a problem, and

- Equipping mobile staff with technology that is connected to back-office systems so that they can conduct and record inspections in real-time on their mobile devices.

Enforcement and building processes will be the initial priorities – as the areas where the most significant transaction volumes exist – before attention turns to other development processes.

6.2.3   SAP Multi-Year Plan, Upgrade and Finance Enhancements

The City has long operated the SAP system as its core financial system. SAP is a robust, comprehensive platform that is widely used by municipalities across Ontario (including Barrie, Cambridge, Kitchener, Pickering, Peterborough) and one which the City should double down on.

"People and Money" processes are core processes that form the backbone of any organization. The City's ERP is one of the keys to offering staff a more digitized self-service model with the potential to offer online paystubs, time reporting, leave requests, expense claims, requisitions, among many other things. So, having a robust and evolved ERP is central to delivering a more digital staff experience.

An upgrade is required to the City's SAP environment, which is planned and budgeted for in 2023. Before then, in 2022, the City should plan to develop a multi-year SAP roadmap identifying major initiatives and priorities for the coming years.

City staff should work collaboratively through the recommended "People and Money" working group, with external consulting assistance, to determine what enhancements should be considered as part of the upgrade and to map out the longer-term roadmap for SAP enhancements.

6.2.4   Comprehensive HR Process Management System

One of the City's most important assets are its people; they also represent one of the largest costs, so it is critical to effectively manage the workforce from onboarding to retirement using digital processes rather than paper-based employee files.

The City's current employee records are largely paper-based or tracked in numerous spreadsheets. HR processes such as recruitment and training tracking must be modernized. Existing process management is extremely time consuming, inefficient and prone to error and the management of data related to processes consumes much HR staff time.

It is important to note that this is a drag on the whole organization – something that inhibits organizational flexibility and agility and that doesn't provide management with the insights that a more comprehensive and effective HR solution could.

A comprehensive HR management system is a corporate-wide solution, not simply a "system for HR", and thus must meet the needs of the whole organization (leadership, management, staff (part-time, full-time)).

A new HR management system, based on SAP is required.

Implementation of such a solution will likely address the following needs and capabilities:

- Position management.
- Employee records.
- People metrics and analytics.
- License and training tracking.
- Time and attendance.
- Shift scheduling.
- Applicant tracking and online recruiting.
- Learning management.
- Succession planning.
- Performance management.
- Absence management.
- Employee self-service.
- Health and safety.

We recommend that consideration also be given to historic data digitization and the need to load prior employment history and records into the system, prior to go-live.

This work is dependent upon the SAP roadmap identified above and thus, some interim solutions may be required until a more comprehensive solution can be tackled in 2023. Specifically, interim improvements to the shift scheduling and recruitment processes are anticipated in 2022.

6.2.5 Water and Tax Billing Replacements

The City's Water Billing and Tax Management systems are planned for replacement as both have reached end-of-life.

In practice, these are two separate initiatives.

Each of these initiatives is designed to replace existing back-office systems that manage billing processes, while also introducing online portals allowing customers to self-manage their services, monitor usage and set up billing arrangements.

6.2.6 CRM System

The City plans to undertake a customer service review and it is likely that the review will, among other things, indicate a need for a CRM system to underpin service delivery.

Most municipalities of Thunder Bay's size have implemented such a solution which is designed to track and route customer inquiries in a consistent and traceable manner.

While this work should not be considered an immediate priority (given the other work that is identified in the Strategy) it is an important component of any Municipal Technology Model and a significant undertaking that should be understood before any plans are made for implementation.

6.3 Digital Infrastructure

Ensuring we have the connectivity, Cloud capabilities and cybersecurity to support the City and our community.

6.3.1 Network Improvements and Long-Term Network Strategy

The City's networks are the foundation for all digital and technology capabilities and services. These networks must be robust, reliable, and highly performant. Working with Tbaytel as a partner, with fibre connections available across the City, there is no reason why this cannot be the case.

Today, however, the City's corporate network performance is not satisfactory at various locations. So, in the short-term, the City should increase its operational spend to increase network bandwidth and service to each of its facilities.

More broadly speaking, the City operates various networks, and demand for IoT solutions that will add more connections to City networks is ahead.

The City should consciously plan – with internal (e.g., InOps, Community Services) and external (e.g., Tbaytel, regional CIOs group) – for strategic network expansion and development, re-using, where possible, investments in networks for specific purposes that can be re-used for broader City and community benefit.

6.3.2 Public Wi-Fi Expansion

The CRTC has classed access to the internet as "a basic human right" and the community consultation for this project explicitly pointed to the fact that access to the internet is now an equity issue for the community.

This has flagged an opportunity to expand access to public Wi-Fi throughout the community, in civic facilities and in public spaces.

The City should work with Tbaytel and other community partners to figure out where expanded public Wi-Fi could add community value and develop a plan for implementation.

6.3.3   Automated Meter Reading (AMR) and Traffic Signaling

AMR is an IoT technology that provides remote meter reads and supports various other capabilities, such as time of use billing and customer near-real-time monitoring of their usage.

Many municipalities across Ontario and Canada have implemented such a solution. The Grant Thornton PSR recommended that the City evaluate the opportunity and business case and the City plans to develop a business case in 2022.

Subject to a business case being demonstrated and funding being available, work on the project could begin in 2024. A placeholder has been created for this project in the IT workplan as CIT staff will be required to support the delivery of such a project. This is a complex and large project that would need to be fully integrated into the City's water billing system.

The Traffic Signaling Modernization Program is an example of a City-wide IoT solution that is dependent upon a network. The modernization of the current traffic signaling network should be coordinated with other City network strategies.

The four-year upgrade program should be aligned with other City network planning as it is possible that network connections to traffic signal locations can be shared and other municipalities have pursued such a strategy.

6.3.4   Cybersecurity Program

Municipalities across Canada and North America are actively being targeted by cyber criminals. Those municipalities that have been the target of ransomware have been hit extremely hard.

Following their ransomware attack in 2019, it cost the Town of Woodstock over $1 million to recover and put suitable protections in place to prevent further attacks. The experience caused significant reputational and fiscal harm to the Town, not to mention the disruption and person hours that were poured into the resolution.

Clearly, the City must do what it can to mitigate a similar situation occurring. It needs to stay ahead of the situation by developing a comprehensive and robust security program.

Budget has been allocated in 2022 to ramp up the City's security efforts and to develop an ongoing, funded security program that will focus on policy, practices, education and training, as well as technology and services to mitigate the threats. Regular external assessments and testing will also be undertaken to independently verify the City's security posture and readiness.

6.3.5 Regional Partnerships

The consulting team recommends that the City's CIT Director work with regional partners to explore opportunities for partner working.

Areas of interest could include knowledge and experience sharing, shared investments in regional infrastructure, overarching data sharing agreements to simplify organization data sharing, shared staff technology training and shared staff development programs (staff exchanges, etc.)

Potential partners could include the regional hospital network, police, libraries, Tbaytel, and other local utility companies.

Establishing communication channels and a quarterly meeting between technology and digital leaders in each organization would be a good starting point. The agenda should facilitate sharing of strategy and work plans, allowing the group to explore commonalities and opportunities to partner. Work in this area is already underway and some promising opportunities have been identified.

More broadly, the City could also benefit from looking beyond the region to other municipalities and how they are tackling similar issues to Thunder Bay.

Establishing mutually beneficial relationships with other similar sized and situated communities such as Sudbury, Red Deer and Barrie could be extremely valuable in helping City management and staff find tried and tested practices, ideas, and approaches that can be borrowed and applied.

6.4 GIS and Data

Managing data well and using it to drive our practices and decision-making.

6.4.1 GIS Strategy

The City's GIS Strategy notes that the City is *"struggling to move beyond the departmental [maturity] level due to a combination of governance issues, unequal distribution of skills and resourcing gaps".* This is consistent with findings in this Strategy.

The GIS Strategy recommends a need for stronger collaboration, for robust governance, for GIS leadership and for clear roles and responsibilities. These recommendations are directed toward GIS specifically but also apply more broadly to digital and technology.

EMT has received the GIS Strategy. A request for a GIS Coordinator role to lead the execution of the GIS Strategy and to be based in CIT has been included in the proposed 2022 budget.

GIS leadership is essential to coordinate efforts of distributed GIS staff to priorities identified in the Strategy – including technology updates, moving to a web-based GIS delivery mode, roles and responsibilities clarification, provide training and to drive data improvement projects that will support strategic initiatives (such as asset management).

6.4.2   GIS Upgrades

GIS is one of the City's major enterprise platforms and one of the City's most advanced and developed data resources. Further exploitation of GIS at the City represents a huge opportunity to become more data driven.

The City's recently completed GIS Strategy – which this Digital Strategy fully supports and endorses – identified a series of GIS software upgrades (to version 10.7.1) and enhancements (ArcGIS enterprise) which would be required to gain full value from the technology. The upgrades are currently underway and should be completed in early 2022.

These enhancements will support increased use of Esri's Cloud services, enhanced mobile data collection and workforce management and the enablement of additional self-service GIS solutions. Furthermore, these upgrades will directly support the delivery of interim asset and work management solutions.

6.4.3   Internal and External GIS Self-Serve Solutions

The City should continue to democratize access to the GIS, making it simpler for non-GIS specialist use by deploying web-based GIS solutions and apps.

Several self-service solutions should be developed, including:

- Self-service map creator – Simple tools to allow staff to make their own maps, and map-based outputs without requiring a GIS professional to assist them.

- Field data collector – A generic tool for field-based data collection that feeds data into the corporate GIS database.

- Operations dashboards – A generic tool that can be used for visualizing and monitoring operational work such as inspections and work order completions.

- Where's my nearest – A customer-facing solution to help customers find their nearest services, for instance, where is the nearest park, recreation centre, waste disposal location, etc.

- What's happening here – A customer-facing solution to communicate what's happening at a location, for instance, roadworks, development proposal, City project.

Working with the GIS Coordinating Group and Community of Practice will help to identify other key solutions and services that are required.

6.4.4   Integration Technology

The City is in the process of implementing the Feature Manipulation Engine (FME) product as a GIS integration tool.

Various municipalities in the GTA use this solution as their corporate integration technology and we recommend that the City do the same – skilling up staff in CIT to support and implement integrations using FME.

FME has connectors that enable easy integration with SAP, Esri and Microsoft 365 along with Salesforce and a variety of other major software including Snowflake, Socrata, Maximo, Google Workforce, Cityworks and AWS.

6.4.5   Data Strategy and Governance

In pockets, the City is, of course using data to inform practices and using reporting and analysis to better understand service delivery, however, a longer-term goal for the City is to leverage data and analytics consistently and more effectively across the organization to mash-up data from different sources (e.g.,. Finance, HR, Work Management and GIS), to analyze performance, to identify patterns and distributions and to begin to anticipate and prepare for the future by getting into predictive analytics.

The City cannot be successful in this domain without high-quality data and without the right practices and procedures and clearly defined roles and responsibilities regarding data. This can be extremely challenging.

The City must also determine what its data priorities are – which datasets need work and which are the highest priority because of their broad use across the organization (e.g., employees, assets, addresses, GL codes).

Developing a Data Strategy is important – but this comes later in the plan – simply because, until the City has its core processes digitized, it lacks the core data it needs to truly derive strategic benefits from data investments.

6.4.6   Automated Vehicle Location (AVL) and GPS Review

The City currently uses various AVL systems to track vehicles and various data points around vehicle usage (speeds, mileage, plow up and down, etc.).

Looking to the future, the City should consider consolidating the various systems in use and look more closely at the value of sharing data about the City's snow clearing or road sweeping programs publicly.

This has, over the last decade, become fairly common practice across Canadian municipalities and the transparency has helped reduce calls and complaints from residents.

Furthermore, the City has a fleet of vehicles passing throughout the City and this can be looked at as a vast sensor network that can collect information about things such as weather, road condition, traffic, etc.

6.5 Digital Services

Providing great, self-serve digital experiences to customers over visits or calls to City Hall.

6.5.1 Digital Services First

It is recommended that the City make a formalized commitment to digital services by making a clear statement to internal service owners and staff that customers want to interact with the City digitally and, in turn, the City prefers to deliver services digitally over other channels.

6.5.2 Digital Declaration

As such, we suggest that the City have the City Manager, General Managers, Directors and Managers in the organization sign a Digital Declaration or attestation.

This declaration affirms our ambition for City services in the internet age and our commitments to realizing it.

It commits us to working to:

- Offer our services as end-to-end digital services that meet our digital service standard.
- Design services to best meet the needs of citizens.
- Protect citizens' privacy and security.
- Deliver value for money.

By signing the declaration, all leaders and owners of service in the organization acknowledge that the City's preferred and expected approach is for all services to be delivered digitally, that they commit to prioritizing the delivery of digital service in their respective areas, and that any new services must be designed Digital First.

Furthermore, leaders and management must work with staff to build the case for and support the realization of digital change. Ensuring consistent adoption of new digital processes must be fulsome – it cannot be variable or optional for staff.

6.5.3 Digital Service Standard

The Good Service Standard, developed by Lou Downe (a former staffer at the Government Digital Service in the UK) provides simple and digestible advice about how to build services that work.

Ms. Downe has identified fifteen principles of good service design and provides training on how to use and employ them.

Table 9: The 15 Principles of Good Service Design

15 Principles of Good Design – Lou Downe
1. Is easy to find.
2. Enables each user to complete the outcome they set out to.
3. Clearly explains its purpose.
4. Sets the expectations a user has of it.
5. Works in a way that's familiar.
6. Requires no prior knowledge to use.
7. Is agnostic of organizational structures.
8. Requires the minimum possible steps to complete.
9. Is consistent throughout.
10. Has no dead ends.
11. Is usable by everyone, equally.
12. Encourages the right behaviours from users and staff.
13. Responds to change quickly.
14. Clearly explains why a decision has been made.
15. Makes it easy to get human assistance.

The City should use this framework to be clear about what is expected of a good digital service and the Good Service Standard Scale is a tool that the City can use to evaluate and assess its current and future digital services[8].

When building new digital services, it is recommended that the City adopt a digital service standard.

It is recommended that the standard methodology shown below, proven to result in high-quality digital work and developed by the Ontario Digital Service, be adopted.

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[8] Note that the Good Service Scale can be used to assess non-digital services too. More information is available at https://good.services/.

Ontario Digital Service Standard – Guidelines for Good Digital Practices

Release in phases:

1. Understand users and their needs.
2. Establish the right team.
3. Be consistent.
4. Design the service from start to finish.
5. Ensure users succeed the first time.
6. Test the end-to-end service.
7. Make it accessible and inclusive.
8. Be agile and user-centred.
9. Use open standards and common platforms.
10. Embed privacy and security by design.
11. Support those who need it.
12. Measure performance.
13. Be a good data steward.

Find out more at https://www.ontario.ca/page/digital-service-standard.

This standard was drawn from a community of practitioners working on digital government across the world – predominantly in the UK, US and Australia – so represents a set of well-worn and battle-tested best practices.

6.5.4   Forms Digitization Program

Many of the City's services are offered via application and many of those services require customers to complete forms.

In many cases, these forms are PDF or Word forms that provide a poor experience for customers, that don't validate or check the information that customers provide before they submit, and that are not accessible to some members of the community.

The City has implemented an eForms product as part of its website that can be used to turn those forms into simple, easy-to-use and accessible forms that work on any device, from smartphone to desktop.

The eForms product can collect any information from customers, can validate data entered (checking phone number of email formats, for example) can enable signatures and can process payments.

Furthermore, the eForms product can load the data submitted by a customer into a database or application, using its integration capabilities.

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.

Thus, in the interim, the City should work on converting all its forms into eForms, starting first with the highest volume forms that will have the largest impact to customers.

6.5.5   Payments, Billing and Online Payments

Customers and Council members flagged the importance of making it simpler and easier to pay all City bills, invoices, and fees online.

To achieve consistency, the City should set a corporate policy position on digital payments and implement simple, reusable payment solutions that can be integrated into all City services to accept all payment types.

In the interim, the City should work through the Fees and Service By-Law and enable standalone digital payments for the highest volume transactions that are suitable for moving to digital payment options.

A key measure of success will be the number of services for which digital payments are available and the uptake of digital payment options. Experience in other municipalities suggests that uptake will be significant.

Shown below is a sample Payment Processing Form from Georgian Bay. The form is simple and straightforward and mandatory information is clearly marked with an asterisk, making it easy for customers to understand and use the form for payment submission.

Figure 28: Sample Georgian Bay Payment Processing Form

6.5.6   Building Permits, Licences, Planning

As part of the work on AMANDA to support improved back-office and field office process workflows, the City plans to implement online permitting, licensing and planning services.

This will involve implementing a citizen portal for AMANDA that will enable customers to apply, pay, submit digital drawings, receive permits digitally, as well as book inspections online and receive pass and other notices online and via email.

6.5.7   Expansion of Recreation Programming, Marina and Campground Online Booking Management

The City has recently launched online recreation programming using PerfectMind, to which the community has reacted well.

Uptake of online booking has been healthy with 71% of recent registrations for families occurring online and with 55+ classes also seeing over 50% uptake of the online registration option.

The City intends to expand the services available for booking online, expanding the classes and courses available, as well as moving facilities booking online.

The City also plans to implement online booking and account management capabilities for the marina and City campgrounds.

7.0   Strategic Plan Support

The initiatives identified in the Digital Strategy directly support the City's Strategic Plan at all levels, including the Vision, strategic priorities, and strategic action areas.

The diagram below highlights where and how the Digital Strategy deliverables directly support each of these elements.
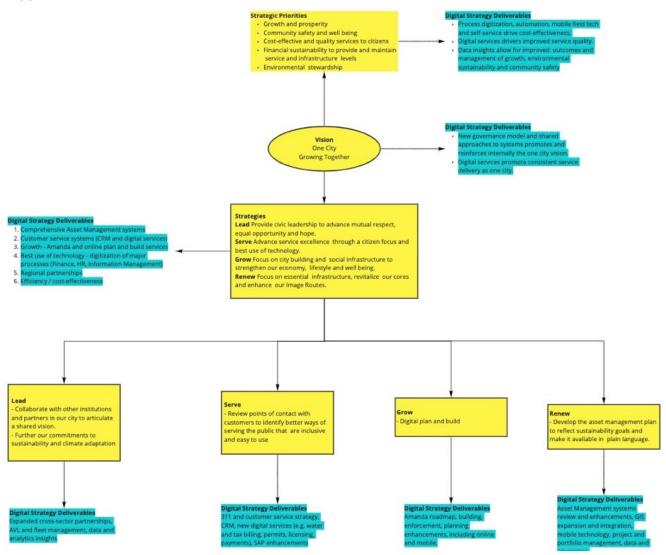
Figure 29: How the Digital Strategy Supports the Corporate Strategic Plan

The notion encapsulated in the **Serve** Strategy – *advance service excellence through a citizen focus and best use of technology* – is at the heart of the Digital Strategy, with a focus on customer-centricity and using technology to its fullest to provide quantifiable efficiencies that free staff from mundane, repetitive work, to focus on more value-added activities.

The Digital Strategy supports a range of other strategies and initiatives recommended as part of the Program and Service Review. These include:

- IT profile and capabilities (recommendations 14, 15, 16, 17).

- HR process and data management improvements (recommendations 20, 21).

- Fleet improvements (recommendations 27, 29, 34).

- Roads communications and engagement (recommendation 35).

The Strategy also directly supports work associated with:

- City's Accessibility Plan – Via an increased focus on web accessibility.

- Asset Management Plan – Via investment in asset management and GIS systems and data analysis capabilities.

- Economic Development Plan – By reducing red tape, simplifying and moving development and permitting processes online.

- Long-Term Financial Plan – By identifying up-front investments with long-term potential for savings and efficiencies.

- Recreation Master Plan – By expanding access to program registration and moving other services online.

- Climate – Through the implementation of tools that will facilitate increased work flexibility as well as improved asset management practices that will lengthen useful life of key City assets.

- Urban Forestry Management Plan – By continuing to provide tools and technologies to help the Forestry Team manage the City's forestry assets.

8.0   Roadmap

8.1   The Stages of Digital Organization

The Strategy envisions three discrete stages to putting the City on the path to becoming a more digital organization.

The three stages are:

- Setting Up for Success – 2021-2022.
- Digitizing Core Processes – 2022-2025.
- Digital Service Acceleration – 2023-2025.

Figure 30: Strategy Implementation Staging

While this visually represents the approach, it should be noted that it does not mean that no digital services will be introduced before 2023.

On the contrary, numerous new digital services will be introduced but, in 2023, the City will be positioned to accelerate digital service delivery as a result of the progress made on back-office process digitization.

8.1.1   Setting Up for Success: 2021-2022

During this stage, the City will be:

- Establishing the new governance model.
- Readying for the 2022 budget process.
- Designing new intake processes.
- Applying project management best practices.
- Establishing the new IT organization structure.

This is a period of transition where projects will continue to be delivered, but where the focus will be on building out *how* things are being done – the right way.

8.1.2   Digitizing Core Processes: 2022-2025+

During this stage, the governance processes and new organization will be put in place and the engine of delivery will begin to develop.

Project capacity and delivery should begin to ramp up and a few of the significant enterprise business systems projects will be underway.

The work here is the core focus of the Strategy – digitizing core processes around people and money, assets and work, land and property and collaboration and information management.

8.1.3   Digital Service Acceleration: 2023-2025+

Work on digital service delivery is already underway and there are numerous online services planned for 2022 and beyond (as shown below).

However, the intent is that, in 2023, digital service delivery begins to really build momentum and speed.

As the City builds out its digitized foundations, it will enable the launch of new complete, end-to-end, real-time digital services for citizens including online permitting and licensing, massively expanded online payments, bookings, and online tax and water billing.

2022

- Mobile device (iOS and Android app) for parking payment and parking session management
- Online parking ticket and other citation payments
- Online forms digitization program (using eForms) – actively working on transforming high-volume forms from PDF / Word to online fillable forms (to include payments, image and document attachments, and digital signatures)
- Online program registration expansion – new programs, drop-in and facilities booking
- Online campground booking
- Digital elections
- Adoption of digital payments engine (including setting payments policies and standards, pre-authorized payments, etc.)
- Online water billing / portal
- Childcare online portal (registration, invoicing, tax receipts and communications)

2023

- Rollout online payments for high-volume, high-profile services

- Online booking engine (for appointments / bookings with City staff (e.g. family meetings/conferences)

- Establish Digital Approvals and Signatures Policy / practice and rapidly expand use of digital signatures

- Online building permitting (apply, pay, book inspections, receive inspection results)

- Online by-law complaints

- Online tax portal

- Online map services – where's my nearest (park, rec facility, recycling centre, etc.), what's happening here (planning, roadworks, etc.)

- Continued growth / expansion of Open Data (including Waze and other partnerships)

2024

- Online planning and development

- Online licensing

- Online sportsfield and park venue bookings

- Online special events permits

- Online sewer and water connection permits

- Online marina booking – customer self-service / payment portal

- Ongoing waste management digital service improvements – expansion of recollect.net

- Additional InOps permits (e.g., heavy loads), online forms and payment

- Digitized FOI system + proactive disclosure, including expanded Open Data publishing

Track my plow

-

8.2　Major Strategic Activities

The timeline in the following table identifies the major and strategic activities that are recommended for the next four years.

The workstreams and supporting activities are abbreviated in the table as follows:

- Digital Workplace: **Workplace**
- Digital Processes: **Process**
- Digital Infrastructure: **Infra**
- GIS and Data: **GIS and Data**

- Digital Services: **Services**
- Governance: **Gov**
- IT Organization: **Org**
- Digital Culture: **Culture**

Table 10: Major and Strategic Initiatives Recommended for the Next 4 Years

Work-stream	Initiative	2021	2022	2023	2024	Review
Culture	Digital Strategy change management and digital literacy program.	X	X	X	X	
Workplace	Microsoft 365 (collaboration platform) implementation.	X	X	X	X	
Services	Parking service digitization.	X	X	X		
Process	Water Billing System replacement (to include online customer account portal).	X	X			
GIS and Data	Corporate integration platform (FME system implementation).	X	X			
Services	Transit Electronic Fare Management System.	X	X			
Process	Agenda.net replaced with eScribe.	X	X			
Gov	Establish working group – Asset and Work Management Systems.	X				
Org	Review CIT Manager role and establish as CIT Director and review CIT Supervisor roles.	X				

Work-stream	Initiative	2021	2022	2023	2024	Review
Infra	Traffic Signaling System upgrade (including reviewing options for additional sensors and cameras).		X	X	X	
Infra	Partnerships with Tbaytel, regional hospitals, Synergy North, police, libraries, CEDC and others to advance regional technology.		X	X	X	
Process	Enforcement service digitization, including mobile technology.		X	X		
Process	Building service digitization to include mobile and ePermitting and digital drawing management.		X	X		
GIS and Data	Expanded internal GIS solutions (including Collector, Operations Dashboards, etc.).		X	X		
Gov	Conduct information, technology, digital and security policy review and build out required policies.		X	X		
Gov	Conduct a review of IT financing and determine most suitable and effective funding and budgeting mechanisms.		X	X		
Workplace	Information Management Strategy.		X			
Org	Review water and wastewater IT and OT responsibilities and accountabilities.		X			
Process	SAP multi-year product roadmap, upgrade and Finance process automations and self-service.		X	X	X	
Infra	Network Strategy and upgrades.		X	X		

Work-stream	Initiative	2021	2022	2023	2024	Review
Infra	Further develop and grow the Cybersecurity and Risk Management Program.		X	X	X	
Services	Digital First policy/commitment and corporate-wide communication.		X			
Services	Online program registration expansion (programs, drop-in and facilities).		X			
Services	Digital elections.		X			
Services	Online campground booking.		X			
Services	Online childcare portal.		X			
Gov	Constitute IDTG Committee.		X			
Gov	Set up Architecture Review Board.		X			
Gov	Set up opportunity intake and project prioritization process, including ROI assessments.		X			
Gov	Digital Strategy performance / progress metrics.		X			
Process	Work and Asset Management Systems review and modernization.		X	X	X	
Services	Online Forms Digitization Program (using eForms product), actively working on high-volume forms.			X	X	
Workplace	Electronic Document and Records Management (ERM).			X	X	

Work-stream	Initiative	2021	2022	2023	2024	Review
Workplace	Smartphone and Computing Devices Review and Modernization Program.			X		
Process	Tax Billing System replacement and implementation of customer portal.			X		
Infra	Cloud Adoption Strategy, policy and roadmap.			X		
Services	Implement online payments for high-volume, high-profile services.			X		
Services	Online booking engine (expansion / deployment).			X		
Infra	Automated Meter Reading (TBC based on business case).				X	
GIS and Data	Data Management and Governance Strategy.				X	
GIS and Data	Data platform, data visualization and analytics pilots and projects.				X	
GIS and Data	Review AVL/GPS Solutions Strategy and implement a variety of AVL solutions (e.g., track my snowplow).				X	
Services	Online services, including marina and other permits.				X	
Process	CRM system.					X

8.2.1   Assumptions and Caveats

2022 Projects

The City has identified in the proposed 2022 budget, funding for Digital Strategy initiatives that will be applied to projects identified for 2022.

In addition, budget requests for additional staffing to support the delivery of the Digital Strategy have been identified and are included in the proposed 2022 budget.

Thus, recommended Strategy activities identified for 2022 can be funded within the proposed 2022 budget envelope.

Budget Process and Funding

The roadmap does not include detailed costing for each project because, at the *Idea* stage, estimates would be too high-level and misleading to provide useful guidance.

Nonetheless, order of magnitude estimates have been provided to City management by the consulting team for all the projects identified.

As described in earlier sections of this report, moving forward, the City will develop a combined annual technology Work Plan, supported by suitable business justifications and cases that have followed the required due diligence steps. This means that individual project proposals will have passed through the *Idea, Concept* and *Project* proposal stages, allowing for the development of detailed financial, resource and business cases that demonstrate their value.

Through future years' budget processes, individual projects will be required to clearly articulate the business value before being approved and funded.

Resources

It has been assumed that the City will be able to allocate sufficient resources to support the implementation of the roadmap – at least in 2022 to start implementation work.

Several IT resources have been identified in this Strategy as immediate needs required to bolster critically important services. These requests are included in the proposed 2022 budget.

Further, many initiatives will also require investment in departmental resource to fulfill the business function as associated with technology projects.

Going forward, as already discussed in the Alternative Resourcing Strategies section, the use of contracting and backfilling, along with vendor resources to augment internal resourcing, will be key to successful project implementation.

In future budget cycles (2023 forward), all project proposals shall also identify resource costs allowing for the capitalization of resource costs and allowing the City to secure contract staffing and to execute backfill programs.

Timing

It is the responsibility of the CIT Director and IDTG to use this roadmap as input to guide annual work planning, however, the suggested timing of these activities is based on information known at this time and may be subject to change as business needs and situations arise.

New initiatives – which will be managed through the new project intake process – should also be anticipated.

The City should establish an annual process with the CIT Director and IDTG to recalibrate the four-year plan following the completion of the annual Work Plan.

The revisit will identify new initiatives on the horizon and revise timing of anticipated work.

8.3   Benefits and Efficiencies

Investment in technology is typically an investment in staff productivity, community benefit, or improved customer service.

Any investment should be expected to achieve a return on that investment and that return should be measurable. As such, it has been recommended earlier in this report that the City adopt a business case approach to justifying and evaluating proposed technology investments.

8.3.1   Understanding Benefit Types

It is important to understand that benefits from technology investments typically fall into several categories:

Cashable benefits: Cashable benefits are changes that result in the municipality having more money to spend, either through savings or through additional revenues.

Non-cashable benefits: Non-cashable benefits are changes that do not lead to an immediate cashable benefit, but save money in future budgeting periods, by avoiding adding staff, or avoiding future procurement costs.

Wider economic benefits: These improve things for your customers outside your organization and include things like:

- Saving users' time or improving their experience.

- Reducing private sector costs (e.g., time costs associated with waiting for a building permit).

Some projects will deliver all three of these benefit types, however, the typical benefit that we see with the types of technology proposed in this Strategy will result in a combination of non-cashable savings and wider economic benefits.

This means that the benefits are achieved with staff working less on repetitive activities that are suited to computers and more on higher value activities; with inspectors and crews getting more done; with applications and licences processed faster, and these kinds of things.

The benefits manifest themselves in cost avoidances and higher service delivery standards.

8.3.2   Examples of Potential Benefits

There are numerous examples of municipalities achieving cashable and non-cashable benefits through the implementation of technology, some of which are highlighted in the examples below.

Digital in Action

- The City of Mississauga moved its recreation guide fully online, replacing its paper-based version and saving $230,000 per year in printing and distribution costs.

- The City of London implemented iPads for Fire inspectors. Mobile inspections are now 25% more efficient.

- Similarly, a BC municipality plans to move to a mobile-enabled, paperless process for Fire inspections. It anticipates reduced administrative support needs from 60 days a year to 4 days per year and savings of up to $185,000 a year in labour savings across the service.

- The City of Hamilton saved an estimated $360,000 per year by implementing mobile inspection tools for its 37 building inspectors.

- The City of Mississauga, a BILD acknowledged leader in online development and planning, has seen a 25% decrease in total review time (elapsed time to review applications) and a 57% decrease in time taken to process site plans through the digitization of the Development Approvals process. Customers are no longer required to submit 30 hard copies of each drawing. Continuous improvements related to digitization and lean process review have resulted in over $1,000,000 in savings.

- The City of Edmonton has trained a Machine Learning model on a decade of data to speed safety inspections. Inspections deemed minimal risk are passed automatically, eliminating unnecessary delays in builder timelines. Since October 2019, the predictive model has reduced the number of eligible inspections by 37%. City inspectors can focus on higher risk and more complicated inspections, which pose greater threat to safety.

- Corpus Christi, TX implemented a mobile work management for its field crews and saw the average number of work orders closed per day increase from 11 to 18, an increase in productivity of 63%.

- The City of Guelph conducted an efficiency review of its mostly manual time and attendance processes. The process consumed an estimated 54,000 person hours each year at a cost of $2.5 million. Digitization is anticipated to halve the cost of running the process.

- The City of Cambridge has used its Asset and Work Management system to systematically increase the roads rated "good" by 50% over a 3-year period. This is expected to eliminate over $71 million in repair backlogs.

- By analyzing their work orders, wastewater staff at Corpus Christi found that nearly 33 percent of the department's effort was spent resolving problems at just 1.4 percent of customer sites. With this information, the City developed and implemented a repair plan that resolved these ongoing issues and ultimately significantly reduced costs.

- Implementation of a new digital parking process for paid parking, permits and tickets along with the introduction of Administrative Monetary Penalties has seen one Ontario municipality increase revenues by $400,000 and reduce staff time to administer the program by over 8,000 person hours valued at around $500,000.

- The City of Brampton implemented an online Request To Park On Street Overnight. The solution handled over 100,000 requests online per year, which equated to a reduction of 2 FTEs taking calls at the contact centre.

- The City of Chatham-Kent implemented a virtualized call/contact centre for the delivery of improved customer service experience and increased resolution of customer inquiries at the first point of contact, realizing annual savings of over $160,000 in service delivery.

In addition to these examples, Perry Group has a team of business process consultants that work with municipalities to optimize processes. The team has been busy with municipal modernization projects funded by the Province and, over the last two years, has completed over 200 business process optimization reviews with municipalities across Ontario. In each case, optimization involves streamlining and simplifying processes and applying process digitization and digital service concepts to redesigned services.

Quantifiable efficiencies identified have ranged from $20,000 – $900,000 per year, with an average of $80,000 per high-volume process/service.

Given the low levels of process digitization present at the City today, it should be anticipated that similar savings could be possible across many of the City's major processes through digitization.

8.3.3   Specific Benefits for Thunder Bay

The Strategy does not establish a full business case for every project identified. This is not possible at this time because the Strategy has not worked at the detail level needed.

As noted above, the major projects coming forward in future budgets should articulate a clear business case.

Nonetheless, focusing on the following four specific initiatives identified in the Strategy, the consulting team and City staff have collated information to illustrate estimated benefits and highlight potential benefits that could be achieved from some of the proposed digitization of core processes.

Table 11: Potential Benefits from Some of the Proposed Digitization of Core Processes

Initiative	Benefits	Benefit Type	Comments
Accounts Payable Automation	Estimated $120 – $160k benefits in staff time savings per year	Non-cashable	Investment of $320k required with a payback of 2.5 years
Time and Attendance Automation	Estimated $500k benefits per year achieved through timekeeper time savings, reductions in time capture errors (estimated at up to 7%), improved overtime controls, and improved punctuality	Cashable and Non-cashable	Investment of $500k – $750k with a payback of 1.5 years. Estimate based on 3,000 employees
Building Permitting Automation	Estimated $200k benefits in staff time savings per year + customer experience improvements and faster permit processing	Non-cashable and Wider Economic Benefits	Investment of $500k required with a payback of 2.5 years. Using 1,000 permits and 4,500 inspections as the baseline, and a 4-hour time saving per permit
Water and Tax Billing Automation	A conservative estimate of 1 FTE saving per year through automation + customer experience improvements	Cashable and Wider Economic Benefits	5 FTEs in Finance currently administer water and tax payments, address changes

8.3.4 Benefits Realization

As noted, the benefits of digitization and adoption of a Digital First approach to service delivery typically materialize in the form of staff time savings and thus are realized in business units, not in the CIT Division that helped implement the technology.

Often, benefits take the form of cost avoidance – delaying the need to add new staff to cope with growing demand, for instance.

Furthermore, these savings are often incremental and distributed across many staff members. 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 City should track and report on its success against achieving goals set out in business cases, and the Finance team should work with business teams to ensure that savings goals are realized, recovered, and reinvested appropriately.

9.0   Conclusion and Recommendations

This Strategy represents a comprehensive response to the digital opportunities that are in front of the City and that were raised in the PSR.

The Strategy is designed to focus attention on key opportunities and position the City to successfully realize those opportunities and deliver digitally-powered City services.

9.1   Following the Strategy

Following this Strategy will:

- Ensure that the City can deliver services more efficiently.

- Clear current barriers to digital delivery.

- Reduce wasted effort and divergent technology spend.

- Ensure staff are as productive as they can be.

- Ensure that the City can deliver services that meet the changed expectations of many of the City's customers.

Delays to the implementation of recommendations will result in delays to the realization of the potential benefits identified.

9.2   Summary of Strategy Recommendations

In summary, the Strategy recommends that the City should:

1. Adopt and communicate corporate-wide a clear strategic intent and vision for digital service delivery as the City's primary platform for customer service – **a collaborative approach to delivering customer-centred, digitally-powered City services.**

2. Ensure that all service owners commit to moving toward Digital First service as a priority through the signing of the Digital Declaration.

3. Focus on work in the **five key workstreams** below, staying focused in these areas and avoiding distractions with new opportunities:

   a. **Digitize core business processes** as a top priority focusing first on people, money, assets and work, land and property-centred processes and document-centric processes.

   b. Invest in the **digital workplace** to ensure that staff and partners have access to modern collaboration tools that enable them to be productive and effective.

   c. Provide **digital infrastructure** to ensure that the community has access to reliable broadband services and ensure that the City is positioned to be future-proofed and cyber-secured.

d. Invest in **GIS, data and analytics** to ensure that the City optimizes its effectiveness and efficiency.

e. Build **digital services** to deliver City services that meet customer expectations.

4. Setup and operate the recommended Information, Digital and Technology Governance Model to help keep the organization focused on strategic priorities, to enable shared learning and collaborative working on the technology and digital portfolio. This includes:

a. Establishing a corporate Information, Digital and Technology Governance team, to be led by EMT and CIT Management, and to ensure sufficient time and attention can be paid by leadership to strategic technology and digital opportunities.

b. Establishing coordinating groups as the forum for collaboration in key areas of strategy focus – work and assets, land and property, customer service and digital, GIS and data.

c. Establishing a singular intake process for technology initiatives that applies suitable levels of rigor, ROI assessments and architecture to *Idea, Concept* and *Project* proposals.

d. Conducting an IT policies review and expanding the City's IT policy framework to address important areas.

5. Setup and operate the proposed IT and Digital Operating Model to support the delivery of this Strategy and new digitally-powered services. This includes:

a. Elevating the CIT function and pursuing a centralized approach to core technology staffing.

b. Formalizing a revised mandate for CIT along with formalizing roles and responsibilities between CIT and departmental staff (as recommended in this Strategy).

c. Reviewing and elevating CIT Manager and Supervisor roles in line with the City's guidelines for Organizational Job Level Titles.

d. Increasing investment in IT staffing with recommendations to add the following positions in a phased approach over the next 4 years:

- Manager, Delivery.

- GIS and Data Coordinator.

- Project Manager / Business Analyst x 3.

- Application Developer / Analyst x 2.

- Data Engineer.

e. Working on building stronger IT / business unit relationships through a new CIT Run relationship management function.

f. Adopting a consistent project management methodology and improving project delivery capabilities and project outcomes.

g. Increasing focus on architecture.

h. Pursuing alternate resourcing strategies (including capitally funding staffing, using rosters and increasing use of out-tasking) to add additional capacity to CIT to support the delivery of digital solutions.

6. Review IT funding and increase IT investment.

a. Review current approach to IT investment and determine a suitable go-forward model that provides the insights and controls necessary over the City's total technology spend.

b. Fund projects for 2022 through proposed budget commitments and submit 2023 budget requests to support implementation of the next stages of the Strategy.

c. Establish new sources of funding to support increased technology investment, targeting a 3% investment level (capital and operating) at minimum.

d. Capitally fund staffing and backfill for technology projects.

e. Begin to prepare for capital to operating transition associated with a move to subscription and Cloud services.

f. Invest in **digital change management, education, and culture change** through showcasing successes, bringing in external speakers, building CoPs.

7. Measure and report on digital performance and successes.

a. Establish a Digital Strategy Performance Dashboard that reports on key metrics defined in this Strategy.

b. Provide an annual report to Council and EMT on progress against the Digital Strategy.

Appendix A – Glossary of Terms

Table 12: Glossary of Terms

Term	Description / Explanation
ADKAR	Awareness, Desire, Knowledge, Ability, Reinforcement: A change management framework that defines the five outcomes an individual must achieve for any change to be successful.
Architecture	In the context of a technology architecture, is a framework of information technology standards, specifications, models, and guidelines for the enterprise.
BA (Business Analyst)	A role in the Information Technology department for someone who analyzes and documents business processes or business needs for the purpose of sourcing, implementing or enhancing technology.
BI (Business Intelligence)	A technology-driven process for analyzing data and presenting actionable information to help executives, managers and other corporate end users make informed business decisions.
Business Transformation	Significant change (in this document, enabled by new technology) that modifies the fundamental model of *how* or *what* services are delivered.
BYOD (Bring Your Own Device)	A practice of allowing employees of an organization to use their own computers, smartphones or other devices for work purposes.
CTB	City of Thunder Bay.
Cityworks	Asset and Work Management System currently used to plan and track roads and water / wastewater assets.
CLASS	The City's current leisure Registration and Booking Management System.
Cloud, Cloud-Based, Cloud Solution	Cloud-based is a term that refers to applications, services or resources made available on demand via the internet from a remote service provider.

Term	Description / Explanation
COBIT (Control Objectives for Information and Related Technologies)	A best practice framework created by international professional association ISACA for information technology management and IT Governance.
Cogeco	A telecommunications and media service provider.
COPE (Corporately Owned Personally Enabled)	A business model in which an organization provides its employees with mobile computing devices and allows the employees to use them as if they were personally-owned computers, tablets or smartphones.
CRM (Customer Relationship Management)	A category of software designed to help businesses manage customer data, requests and interaction.
Digitization	Digitization is referred to in this document as the conversion of traditional manual or paper-based business processes to technology and data driven form.
Drones	An aircraft without a human pilot aboard, controlled from a ground-based controller.
ECM (Enterprise Content Management)	A series of tools and processes that manage storage, security, version control, process routing and retention of corporate information.
EMT (Executive Management Team)	The City of Thunder Bay's executive team, comprised of the City Manager and General Managers.
ERP (Enterprise Resource Planning)	A system to aid the flow of internal business processes and allow for communication between a business's departments and its internal functions and data. ERP systems include functions such as human resource management, financial management, supply chain management and enterprise performance management.
ESRI	An international supplier of geographic information software (GIS) applications and services.
Firehouse	A records management system tailored for the Fire services industry.
FTE	Full Time Equivalent employee.

Term	Description / Explanation
Geospatial, Spatial	A term used to indicate that data has a geographic component to it. As of recently, the term is picking up popularity in the industry as a substitute for the term GIS.
GIS (Geographic Information System)	A framework where geographic information is stored in layers and integrated with geographic software programs so that spatial information can be created, stored, manipulated, analyzed and visualized (mapped).
Google (G-Suite)	A Cloud-based set of productivity (word processing, spreadsheets, etc.) and collaboration tools offered by Google.
Hot Desking	Enabling multiple workers to use a single physical workstation or surface during different time periods.
iMedic	A Records Management System tailored for the emergency medical services industry.
Integration	In the context of a technology integration, is the use of technology tools to allow multiple systems, processes, or datasets to be combined to produce a common output.
ITIL (Information Technology Infrastructure Library)	A set of detailed practices for IT Service Management (ITSM) that focuses on aligning IT services with the needs of business.
LT (Leadership Team)	The City of Thunder Bay's senior level leadership group comprised primarily of General Manager and Director level staff.
LPMS (Land Planning Management System)	A system to manage and automate workflows associated with building, planning, engineering, permitting, inspections, code enforcement and other land management activities.
Microsoft 365 (formerly known as Office365)	A Cloud-based set of productivity (word processing, spreadsheets) and collaboration tools offered by Microsoft.
Microsoft Exchange	A mail server and calendaring service developed by Microsoft, typically bundled with Microsoft Outlook.

Term	Description / Explanation
MTM (Municipal Technology Architecture)	A model developed by Perry Group Consulting Ltd. identifying the technologies that a municipality should have in place and providing a framework for assessing a municipality's technology environment.
Municipal Benchmark Network (MBN)	A network of Canadian municipalities collaborating to share detailed information and metrics on services and practices to help reduce costs and improve quality of service. MBN was used in this Digital Strategy as a comparative to assess current levels of investment in information technology.
Omni Channel Services	A service that can be accessed through multiple tools, processes and approaches, e.g., requesting a new blue box can be done in-person, online, through a mobile application or over the phone.
Open Data	The idea that some data should be freely available to everyone to use and republish as they wish, without restrictions from copyright, patents or other mechanisms of control.
PM (Project Manager)	A role assigned overall responsibility for overseeing the planning and execution of a particular project.
PMBOK (Project Management Body of Knowledge)	A set of standard terminology and guidelines for project management as published by the PMI (Project Management Institute).
PMI (Project Management Institute)	Industry leading professional membership association for the project management profession.
Retention / Data Retention	The continued storage of an organization's data for compliance or business reasons.
SAP	The City's ERP system.
StoneOrchard	A Records Management System tailored for cemeteries and funeral homes.
Telco (Telephone Company)	Telephone service provider or telecommunications operator.

Term	Description / Explanation
TOGAF (The Open Group Architecture Framework)	A framework for enterprise architecture that provides an approach for designing, planning, implementing and governing an enterprise information technology architecture.
Vailtech	A business system designed to collect and manage property tax payment.
Wi-Fi	The facility allowing computers, smartphones or other devices to connect to the internet or communicate with one another wirelessly within a particular area.

Appendix B – Project Participation

The following people were involved in the development of the Digital Strategy.

Digital Strategy Steering Committee

EMT operated as a Digital Strategy Steering Committee for the project, with the following membership.

- Norm Gale, City Manager
- Cynthia Olsen, Acting Director, Corporate Strategic Services
- Tracie Smith, Director of Strategic Initiatives and Engagement
- Karen Lewis, GM Development and Emergency Services
- Karie Ortgiese, Director Human Resources and Corporate Safety
- Kelly Robertson, GM Community Services
- Kerri Marshall, GM Infrastructure and Operations
- Linda Evans, GM Corporate Services and Long-Term Care
- Jack Avella, CIT Manager and Project Manager
- Ben Perry, Perry Group Consulting

Strategy Development Participants

Directors, Managers, and representatives from the following business units contributed to the development of the Digital Strategy.

- Roads
- Recreation and Culture
- CIT
- Licensing and Enforcement, Realty and Parking
- Environment
- Building and Planning
- Transit
- Financial Services
- Internal Audit and Continuous Improvement
- Revenue
- Long-Term Care
- EMS and Fire
- Facilities, Fleet and Energy
- Childcare and Central Support Services
- InOps Central Support
- Corporate Strategic Services and Indigenous Relations and Inclusion
- Engineering and Operations
- Human Resources and Corporate Safety
- Parks and Open Spaces

Council and Committees

- Mayor and Council members
- Accessibility Advisory Committee
- Community Communications Committee

Members of the Community

- Online survey and consultation
- Public meeting / open house

External and Partner Consultees

Representatives from the following organizations met with the consulting team.

- CEDC
- Thunder Bay Public Library
- Thunder Bay Police Service
- Synergy North
- Tbaytel
- Chamber of Commerce

Consulting Team

- Ben Perry, Project Manager and Lead Consultant
- Alrick Grange, Snr Consultant
- Blair Labelle, Snr Consultant

Appendix C – Details of the Guiding Principles

The following section provides additional details related to the guiding principles.

Principle	The customer is the end user.
Explanation	The City should focus on the end user as the consumer of services and solutions. These service consumers may be internal (think users of HR or Finance services) or external (think builders that will use the online building permitting functions). The City should not design solutions or services without the input of the customer.
Implications	• When developing solutions or services, involve the customer (internal or external) in co-design ensuring that their input meaningfully contributes to better design. • Process mapping and customer journey mapping should be used on projects to ensure that the voice of the customer is heard. • Test solutions with customers (in a beta or pilot stage) before launching them.

Principle	Services should be demonstrably better as a result of investments in technology.
Explanation	Investment in technology is designed to *improve* the situation through lower service delivery costs, improved customer service, reduced risks, cost avoidance or a range of other factors. Before a project is approved, a clear justification should be made regarding the anticipated and quantifiable business benefits to be achieved. Once a project is implemented, the City should track the results to ensure that the planned benefits are achieved.
Implications	• Suitable due diligence is required to fully evaluate projects before funding and resource commitments are made. • Business cases will be required for projects. • Post implementation reviews will be conducted to ensure that anticipated business benefits are achieved and project sponsors will be held accountable for achieving benefits. • Benefits tracking process will allow the City to understand the overall ROI for IT investments.

Principle	Enterprise systems should be deployed if they meet at least 80% of business needs.
Explanation	The intent is to reduce the number of systems that the City operates. This means re-using existing systems before purchasing new systems, i.e., if the requirements are substantially met by an existing system, the preference is to re-use an existing system.
Implications	• Detailed requirements are needed to support the assessment process. • Any exceptions will be escalated to EMT for evaluation. • Re-use of existing enterprise systems (Cityworks, PeopleSoft, GIS) will be encouraged.

Principle	Data is an asset.
Explanation	Data is a *corporate* asset that must be treated like other assets with a clear lifecycle and with resources allocated to its maintenance. Data is owned by the corporation thus, unless subject to legal restrictions, data should be openly shared within the organization. Data stewards are responsible for the security, upkeep and lifecycle maintenance of high-quality data.
Implications	• Increased open-ness toward data sharing. • Data quality with clearly allocated roles, responsibilities and accountabilities.

Principle	Our approach to technology reflects our desire to be an employer of choice.
Explanation	The City aims to offer modern tools and technologies in flexible ways that ensure that technology is not a barrier to getting work done. The goal is to continually revisit and update the technologies to remain relevant and up-to-date.
Implications	• Supporting a range of device types (including frequent recalibration of needs and expectations from management and staff). • Working with a representative "tech savvy" forum to ensure that technology provisions are keeping pace with expectations and needs. • Supporting mobile and flexible working (Wi-Fi). • Modern collaboration tools and capabilities (online meetings, messaging, presence).

Principle	An enterprise-wide perspective will define technology priorities.
Explanation	The City has many competing demands for technology but focusing on fewer initiatives will lead to improved outcomes. In selecting fewer initiatives, taking an enterprise (complete corporation) view of defining priorities (through a corporate governance model) will deliver the best return on investment for the City and have the largest impact.
Implications	• A new governance model will be used to agree on priorities supported by a ranking and prioritization scheme. • Single annual technology project portfolio. • Some groups will be disappointed when their initiatives are not prioritized.

Principle	Technology investments must be supported by key indicators showing short- and long-term value earned.
Explanation	To support the selection process, business technology projects will require clear demonstrations of value. Value may take various forms – cost avoidance, cost savings, improved customer service, reduced risk.
Implications	• Processes to support value calculation (ROI, NPV) that reflect monetary and non-monetary value will be developed and applied to project proposals.

Principle	Technology is a means to an end – success is the result of collaboration.
Explanation	Implementing technology for technology's sake is not where the City will see value. Improved outcomes are the goal. Have the right stakeholders been engaged?
Implications	• Err towards over- not under-inclusion. • Quantify outcomes as part of the project justification process. • Focus is on outcomes and end-to-end services and process design, not on technology implementation. • Increased cross-functional working.

Principle	Architecture and standards drive decision-making.
Explanation	The City will develop and apply architecture and IT standards to reduce the complexity and cost of operating the technology environment, thus increasing agility, responsiveness, and the integration of information. New project proposals will be assessed against the architecture to ensure suitable fit. The Sponsor to IDTG will justify exceptions.
Implications	• Architecture review board to develop and set standards that will be endorsed by IDTG. • Architecture review board to review proposals against architecture and standards – proposals that don't meet standards may need to be adjusted, may be rejected, or may need a formal exception to be made.

Principle	Timely results and appropriate project oversight are key.
Explanation	Project implementation is desired quickly but projects need suitable project oversight to be successful. A suitable balance must be struck between the need to move quickly and ensuring projects have the right guidance and direction.
Implications	• Adoption of project management methodologies – including agile project techniques for projects that are suited to agile delivery – ensuring that the project approach provides enough, but not too much structure.

Appendix D – Detailed Implementation Plan

Table 13: Implementation Plan

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
1-Digital Workplace	1-1	MS 365 Adoption and Management Plan.	50			x			
1-Digital Workplace	1-2	Expand MS Teams to all staff + M365.	Budgeted	Budgeted		x			
1-Digital Workplace	1-3	Migrate to Exchange Online.					x		
1-Digital Workplace	1-4	Information Management Strategy.	75			x			
1-Digital Workplace	1-5	MS Teams / SP / OneDrive / Planner / To Do expansion, including use with external partners.	Budgeted	Budgeted	x	x			
1-Digital Workplace	1-6	Meeting Room Tech – updates.							x
1-Digital Workplace	1-7	Electronic Document and Records Management (ERM).	Budgeted	Budgeted			x		
1-Digital Workplace	1-8	Connect currently non-connected staff with City technologies and communications. Intranet external access (linked to device review).	Budgeted	Budgeted			x	x	

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Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
1-Digital Workplace	1-9	Mobile Working Tech Strategy – review mobile needs and determine suitable solutions strategies.	35			x			
1-Digital Workplace	1-10	Smartphone / devices review and modernization program.	Budgeted	Budgeted			x		
1-Digital Workplace	1-11	Desktop / laptop device review and replacements.	Budgeted	Budgeted			x	x	
1-Digital Workplace	1-12	Evaluate and implement extended CIT support hours for business units (outside of 8:30-4:30).		25			x		
2-Digitized Business Processes	2-1	Work and Asset Management – review and solution strategy.	75			x			
2-Digitized Business Processes	2-2	Interim Work and Asset Management solutions (Workforce) to support operations and AM needs.			x	x			
2-Digitized Business Processes	2-3	Work and Asset Management Systems modernization.	1000	200				x	x
2-Digitized Business Processes	2-4	AMANDA expansion roadmap.	50				x		

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
2-Digitized Business Processes	2-5	Building service digitization to include mobile and ePermitting and digital drawing management.	250	50		x	x		
2-Digitized Business Processes	2-6	Enforcement service digitization, including mobile technology.	200	50		x	x		
2-Digitized Business Processes	2-7	Planning service digitization.	50	10			x		
2-Digitized Business Processes	2-8	SAP multi-year, product roadmap.	Budgeted	Budgeted		x			
2-Digitized Business Processes	2-9	SAP upgrade, including Fiori self-service apps.					x		
2-Digitized Business Processes	2-10	HR System (SAP) modernization and process digitization (core employee master records).	500	250			x		
2-Digitized Business Processes	2-11	HR recruitment interim solutions.				x			

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
2-Digitized Business Processes	2-12	Time and attendance.	500	250			x		
2-Digitized Business Processes	2-13	HR recruitment project.		50		x			
2-Digitized Business Processes	2-14	SAP: Self-service for expense management.	Budgeted	Budgeted			x		
2-Digitized Business Processes	2-15	SAP: Accounts Payable automation.	400	40			x		
2-Digitized Business Processes	2-16	Shift scheduling and shift management review and go-forward strategy.	250	75	x				
2-Digitized Business Processes	2-17	HR: Corporate Learning Management System.	TBD	TBD					x
2-Digitized Business Processes	2-18	Agenda.net replaced with eScribe.	Budgeted	Budgeted	x	x			

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
2-Digitized Business Processes	2-19	Water Billing System replacement (to include online customer account portal).	Budgeted	Budgeted	x	x			
2-Digitized Business Processes	2-20	Tax Billing System replacement and implementation of customer portal.	250	100			x		
2-Digitized Business Processes	2-21	LTC move to PCC from Med-i-Care with Mobile bedside charting.	TBD	TBD		x			
2-Digitized Business Processes	2-22	CRM system (including online portal capabilities, back-office integration and end-to-end service requests).							x
2-Digitized Business Processes	2-23	Archives digitization pilot.	TBD	TBD				x	
2-Digitized Business Processes	2-24	Project and Portfolio Management System.	TBD	TBD				x	
2-Digitized Business Processes	2-25	Specialized Transit on-demand service.			x	x			

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
3-Digital Infrastructure	3-1	Network Strategy – to consider all City network requirements (e.g., SCADA, bus stops, security, traffic management, AMR, landfill).	25			x			
3-Digital Infrastructure	3-2	Network upgrades.	TBD	TBD		x			
3-Digital Infrastructure	3-3	Public Wi-Fi expansion (in partnership with Tbaytel).	TBD	TBD		x	x	x	
3-Digital Infrastructure	3-4	Cloud Adoption Strategy, Policy, and roadmap.	50				x		
3-Digital Infrastructure	3-5	Automated Meter Reading – business case.	Budgeted	Budgeted		x			
3-Digital Infrastructure	3-6	Automated Meter Reading.						x	
3-Digital Infrastructure	3-7	Traffic Signaling System upgrade (including reviewing options for additional sensors and cameras).				x	x	x	
3-Digital Infrastructure	3-8	Further develop the Cybersecurity and Risk Management Program.	$56k budgeted in 2022 for cyber risk & business impact assessment			x			

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
3-Digital Infrastructure	3-9	Enterprise architecture roadmap.					x		
3-Digital Infrastructure	3-10	Grow partnerships with Tbaytel, regional hospitals, Synergy North, police, libraries, CEDC to advance regional technology opportunities and issues.				x	x	x	
4-GIS & Data	4-1	Set up working group – data and GIS.				x			
4-GIS & Data	4-2	Implement organization recommendations from GIS Strategy and roadmap.				x			
4-GIS & Data	4-3	GIS upgrades and Esri GIS portal.			x	x			
4-GIS & Data	4-4	Corporate Integration Platform – FME system implementation.	Budgeted	Budgeted	x	x			
4-GIS & Data	4-5	Expanded internal GIS solutions (including Collector, Ops Dashboards, etc.)				x	x		
4-GIS & Data	4-6	Expanded external GIS solutions (including where's my nearest, report a problem, what's happening here, etc.)					x	x	
4-GIS & Data	4-7	Ongoing GIS data creation and data integration (e.g., assets, service connections, etc.)				x	x	x	
4-GIS & Data	4-8	Create Data (and GIS) Community of Practice.				x			

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Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
4-GIS & Data	4-9	Expand Open Data program.					x		
4-GIS & Data	4-10	Data Management and Governance Strategy.					x		
4-GIS & Data	4-11	Data analytics/BI pilots.					x		
4-GIS & Data	4-12	Community and performance dashboards.					x		
4-GIS & Data	4-13	Data platform.					x		
4-GIS & Data	4-14	Establish master data sources for key data.					x		
4-GIS & Data	4-15	Review AVL/GPS solutions strategy and implement a variety of AVL solutions (e.g., track my snow plow).					x		
5-Digital Services	5-1	Digital First policy/commitment and corporate wide communication.	0	0	x				
5-Digital Services	5-2	Define digital service standards and assessment methodology.	0	0	x				
5-Digital Services	5-3	Online Program Registration Expansion – programs, drop-in and facilities.				x			
5-Digital Services	5-4	Online sportsfield and parks venue bookings.						x	

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
5-Digital Services	5-5	Online special events permits.						x	
5-Digital Services	5-6	Online sewer and water connection permits.						x	
5-Digital Services	5-7	Implement online payments for high-volume, high-profile services.	50	25			x		
5-Digital Services	5-8	Online booking engine – expansion / deployment.	0	0			x		
5-Digital Services	5-9	Online forms digitization program (using eForms product) – actively working on high-volume forms.	0	100	x	x	x	x	
5-Digital Services	5-10	Establish digital approvals and signatures policy / practice.	0	0			x		
5-Digital Services	5-11	Implement digital approvals solutions (approvals and signatures).	0	25			x		
5-Digital Services	5-12	Digital elections.	Budgeted	Budgeted		x			
5-Digital Services	5-13	Online marina booking – customer self-service / payment portal.						x	
5-Digital Services	5-14	Online campground booking.						x	
5-Digital Services	5-15	Transit Electronic Fare Management System.	Budgeted	Budgeted	x	x			

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
5-Digital Services	5-16	Parking service digitization.			x	x	x		
5-Digital Services	5-17	Ongoing waste management digital service improvements – expansion of Recollect.						x	
5-Digital Services	5-18	Online driveway permits.			x				
5-Digital Services	5-19	Additional InOps permits (e.g., heavy loads) online forms and payment.	50					x	
5-Digital Services	5-20	Digital signage/advertising review and program.	TBD	TBD					x
5-Digital Services	5-21	Digitized FOI system + proactive disclosure, including expanded Open Data publishing.	25	10				x	
5-Digital Services	5-22	Adoption of digital payments.	40			x			
5-Digital Services	5-23	Childcare system and online portal.				x			
6-Digital Governance	6-1	Approve and begin to implement IDTG Framework.			x				
6-Digital Governance	6-2	Constitute IDTG Committee.				x			
6-Digital Governance	6-3	Conduct Information and Digital, Technology, and Security Policy Review and build out required policies.				x	x		

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Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
6-Digital Governance	6-4	Conduct a review of IT Financing and determine most suitable and effective funding and budgeting mechanisms.				x	x		
6-Digital Governance	6-5	Setup People and Money Working Group.				x			
6-Digital Governance	6-6	Setup Land and Property Working Group.				x			
6-Digital Governance	6-7	Establish Working Group – Asset and Work Management Systems.			x				
6-Digital Governance	6-8	Setup Architecture Team.				x			
6-Digital Governance	6-9	Setup opportunity intake and project prioritization process, including ROI assessments.				x			
6-Digital Governance	6-10	Project Management Framework.				x			
6-Digital Governance	6-11	Introduce benefits tracking and realization program.					x		
6-Digital Governance	6-12	CIT workplan and resource allocation.				x			
6-Digital Governance	6-13	Continue to measure and report on digital maturity and good service.	0	0		x			

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
6-Digital Governance	6-14	Digital Strategy performance / progress metrics.				x			
7-Digital Culture	7-1	Digital Strategy Change Management Program.			x	x	x	x	
7-Digital Culture	7-2	Digital literacy program – speaker and event series.				x			
7-Digital Culture	7-3	Data Literacy Program – training and education.					x		
7-Digital Culture	7-4	Digital showcase program – share internal digital successes.					x		
7-Digital Culture	7-5	Develop consistent library of technology skills to be incorporated into new job descriptions.				x			
7-Digital Culture	7-6	Update all City job descriptions to include IT and digital skills.						x	
8-Digital Organization	8-1	Formalize and communicate IT Operating / Organizational Model and corporate standards and RACI model for CIT and departments.			x	x			
8-Digital Organization	8-2	Review CIT Manager role and consider establishing the role formally as CIT Director.			x				
8-Digital Organization	8-3	Review CIT supervisor roles – consider re-defining roles as Management level positions and implement other recommended CIT organization changes.			x				

Work Stream	Proj #	Initiative	CapEx. (000's)	OpEx. (000's)	2021	2022	2023	2024	2025
8-Digital Organization	8-4	Budget requests to add resources annually to CIT based on priorities determined at IDT Governance.			x	x	x	x	
8-Digital Organization	8-5	Implement IT Operating Model changes, including aligning positions with CIT.			x				
8-Digital Organization	8-6	Incorporate requirements to capitally fund technology and SME secondments of staff to support large technology projects in 2023 budget year.				x			
8-Digital Organization	8-7	Setup IT Roster (resources-on-demand) model for key platforms.				x			
8-Digital Organization	8-8	Mentoring and IT Management training.				x	x		
8-Digital Organization	8-9	Embrace agile approaches to projects (prototypes, MVPs, modular projects).		20		x	x		
8-Digital Organization	8-10	InOps and CIT will document and review departmental IT and OT technologies, including accountabilities, roles, responsibilities and decision-making authorities for water and wastewater services and report any recommendations to the IDTG and EMT for approval				x			

Appendix E – Operational Improvements

In addition to the strategic recommendations, a series of tactical recommendations are also made for CIT Management to consider.

IT Service Management (ITSM)

A series of recommendations are made around the CIT Division's approach to ITSM. These recommendations include:

- Adopting ITIL as the de facto standard to drive ITSM within IT and ensure application consistently across all teams.
    - Training all IT staff on ITIL foundations.
    - Formalizing the Incident and Problem Management processes (with associated communication with business units about new standards).
        - Defining service standards and expectations and reporting levels.
    - Formalizing the change management process and applying it consistently across all teams.
- Building an IT Service Catalog and developing a user-friendly interface to allow customers to easily interact with and query the catalog.
- Consolidating all documentation into a single knowledge base and exposing the knowledge base to customers to encourage self-service.
- Focusing attention on improving documentation.
    - Conducting a review of key documentation, identifying gaps and prioritizing areas for focused effort.
    - Defining a go-forward standard for "documentation".
    - Establishing a process for identifying, assigning, writing and peer reviewing documentation.
    - Planning for "documentation days" throughout the year.
- Automating, where possible, the service request process (e.g., device ordering).
- Automating, where possible, the incident handling process (e.g., password resets, software installation).
- Implementing an annual customer service survey (modelled on the baseline survey used for this Digital Strategy).
- Reviewing the suitability and effectiveness of the current "out-of-hours coverage" model with service areas and develop options / recommendations for changes.

IT Business Relationship Management

The CIT Division should establish business relationship management responsibilities within CIT (distributed among the management team) which involves:

- A playbook that assures consistent business relationship management and provides a basis for process improvement.

- Communicating the principles of IT Partnership to all CIT staff.

- Active participation of CIT business relationship managers with all divisions during the annual City "Work Plan" process to partner in assuring technology projects.

- Regular service reviews with division leaders to:

  o Discuss current department activities / business pressures / change initiatives.

  o Review previous period service requests and incidents covering performance, trends, recurring issues and outstanding issues.

  o Review previous period changes, if any.

  o Review current project portfolio status for the client's projects.

  o Discuss any corporate project portfolio items that may impact the client department (resourcing, process changes).

  o Discuss any emerging / business problems / potential solution opportunities.

  o Discuss any other business.

- Being available for contact throughout the year.

- A quarterly CIT Director / GM service review program.

IT Team Training

The CIT Division should improve its approach to training, with a focus on:

- Conducting a competency and skills assessment (e.g., ICTC of SFIA competencies) across the CIT Team to identify current competencies, gaps and future needs.

- Establishing a training and development program to target key gaps and needs.

- Developing and communicating clear career paths for CIT staff.

- Working with staff to develop personal development goals.

- Funding and executing an IT training program (as part of capital projects and through operating funding) with an initial focus on the key frameworks being adopted: IT Service Management (ITIL), Project Management (PMBOK), Change Management (ADKAR) and Architecture (TOGAF).

IT Communications

The CIT Division should improve its approach to communication, with a focus on:

- Developing an ongoing marketing and communications plan for IT to the rest of the organization to raise the profile of IT and position it as an enabler, a doer and to communicate the change in IT's style and approach.

- Submitting projects for awards (e.g., MISA, GTECH) to externally validate and celebrate successes.

- Reviewing and revising the tactical communications plan for handling City-wide communications regarding outages, planned maintenance, etc.

- Developing a common (best practice) approach, to be incorporated into the project management framework to communicating and socializing new technology solutions and capabilities (e.g., large file handling).

Purchasing

Government technology procurement is changing, led by new approaches pioneered by 18F in the US and GDS in the UK – to widen the pool of vendors, speed procurement and get improved outcomes, while complying with suitable regulation.

Furthermore, technology rosters – used by both provincial and federal governments – are increasingly used by municipalities.

IT and procurement groups should work together to explore how they can leverage new procurement avenues and approaches.

Application Management

Application management practices could be improved by:

- Developing multi-year application roadmaps in partnership with governance teams.

- Adopting a release management approach for enterprise solutions (with governance teams identifying and prioritizing work for releases).

- Instituting development standards and continuing work to re-platform critical business solutions in the context of strategic plans (e.g., LPMS systems replacement).

- Continuing to maintain development skills in-house, with a de-emphasis of building standalone solutions and a focus on utilizing existing enterprise platforms.

Contract And Vendor Management Program

Contract and vendor management practices could be improved by:

- Maintaining a single online, secure repository of all contracts.

- Establishing an annual contract review program.

- Allocating vendor and partner management responsibilities to IT functional managers with clear responsibilities.

- Actively engaging with vendors / partners with Program Committees on a (minimum) annual basis (to review roadmap and new opportunities).

Tech Savvy Staff Forum

It is recommended that, in addition to the governance process, the City institute a Tech Savvy Staff forum that the CIT Division can use for input to its service delivery plans.

A quarterly, open meeting of technology savvy staff from across the organization could:

- Discuss and provide input to IT plans and roadmaps.

- Discuss barriers and challenges that the CIT Division and IT systems create to business units.

- Brainstorm solutions to the barriers.

- Identify other areas of potential opportunity.

**Corporate Information
Technology Division**

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Memorandum

Date:	December 8, 2021
To:	Dana Earle, Deputy City Clerk
From:	Jack Avella, Manager – Corporate Information Technology
Subject:	Report R 160/2021 Corporate Digital Strategy – Additional Information Committee of the Whole – December 20, 2021

The purpose of this memo, is to provide information requested at the November 22, 2021 Committee of the Whole meeting when the Corporate Digital Strategy - Report R160/2021 was presented as a First Report.

Public Engagement

A question was asked regarding plans to engage the public with the completed Digital Strategy to get further feedback to incorporate into the final report.

The development of the Digital Strategy included a public engagement process, with several options for citizens to provide input though the City's *Get Involved* platform. Citizens were explicitly asked through a survey, idea board and virtual focus group session what digital services they wanted and which services they would prioritize. The resulting requests, ideas and feedback have been incorporated into the Digital Strategy. The Digital Strategy being presented for consideration contains the completed strategy and associated recommendations and initiatives.

As existing digital services are enhanced and new digital services become available, information will be shared publicly to ensure that citizens have opportunities to learn about expanded or additional service options.

Economic impact

Additional information was requested about the economic impact of investing in the Digital Strategy and how the Digital Strategy addresses attracting people to live and work in Thunder Bay.

The Digital Strategy was guided by the recommendations of the Program and Services Review. Those recommendations are focused on making better use of technology within the organization to: drive efficiencies, be more effective, and to transform the delivery of City services through the use of various digital channels. Having citizen-centric, easy-to-use digital services which facilitate interaction with the City will likely have some positive impact when it comes to attracting business and people to Thunder Bay.

Given the City's current digital maturity level, and the need to focus on improving internal use of technology and providing customer facing digital services, the Digital Strategy does not explicitly set out goals or measurements related to economic development. Economic development is anticipated to be a goal for future digital strategy development.

Partners & Collaboration

A question was asked regarding how we will work with various partners and stakeholders to support and achieve the goals related to the Digital Strategy.

Collaboration is the foundation of the Digital Strategy and is critical to ensuring that initiatives within the Strategy can be completed, benefits can be realized and the digital services being sought by the City's customers can be provided. Collaboration will not only be internal to the City, but will be across sectors and with outside partners.

The intent is to put customers at the centre of the development for new digital services. For example, we intend to work with the development and building community in Thunder Bay as we design new digital planning and permitting services.

The Digital Strategy recommends seeking out and fostering opportunities to collaborate on shared cross sector initiatives within the community where there is benefit to all parties. These cross sector initiatives are likely to be wide ranging from shared staff development and training programs, to joint investments in technology infrastructure, platforms and services. Explicitly, an initiative to grow partnerships with Tbaytel, Synergy North, Thunder Bay Police Services, Thunder Bay Public Library, the Community Economic Development Commission (CEDC) and the Broader Public Sector to advance regional technology opportunities and issues is identified within the work plan. In many respects, work is already underway in this area.

Accessibility & Inclusion

Additional information was requested regarding how the Digital Strategy will ensure compliance with the Accessibility for Ontarians with Disabilities Act (AODA), how those with accessibility challenges, or those without access to technology will continue to have access to services, and how the strategy provides opportunities and minimizes barriers for people who have accessibility challenges.

While the focus of the Digital Strategy is to provide online digital services, the vision of the Digital Strategy incorporates a multi-channel approach, which provides for choice when it comes to interacting with the City. The City will continue to offer services across many

channels (online, phone, face-to-face) to meet the needs and expectations of citizens and to ensure that those who may have accessibility challenges, do not have access to technology or do not wish to use online channels will continue to have access to services.

As each online digital services project is defined, applicable accessibility requirements within the AODA will be incorporated into the specifications. Focus groups will be used to test online digital services prior to making them generally available. A component of the focus group testing will incorporate testing for accessibility. Where applicable, compliance with Web Content Accessibility Guidelines (WCAG) 2.0 level AA as defined within the AODA will be adhered to for customer facing digital services.

In addition, the City will strive to adhere to the Ontario Digital Service Standard which identifies 13 guidelines for digital service delivery including guidelines related to accessibility and inclusion. The Digital Strategy also introduces principles of good design which identifies that services must be "usable by everyone, equally". In some cases, and with the right technology aids, access to digital services may remove accessibility barriers for interacting with the City because digital services are available anytime, from anywhere.

Furthermore, the Strategy recognizes that access to technology and the internet is an issue in the community and that inclusion is an area that needs attention. Explicitly, the Strategy focuses on expanding access to Wi-Fi and internet connectivity across the City. This is an opportunity that is currently being explored with Tbaytel.

Additional Information was requested regarding what (if any) consideration was given to Indigenous Reconciliation and how the strategy could be supportive.

The Digital Strategy itself does not directly set goals or objectives related to Indigenous Reconciliation. However, work on the Digital Strategy may result in various partnerships on projects related to Digital Inclusion. This would assist with advancement of digital services, which aligns with Pillar 3 – Education & Inclusion of the Indigenous Relations and Inclusion Strategy (2021-2027) and will be of benefit to all citizens as the City of Thunder Bay continues to move forward in the spirit of reconciliation.

In addition, the Digital Strategy will support commitment 10, which aligns with Pillar 4 of the Indigenous Relations and Inclusion Strategy with the goal of advancing Indigenous community prosperity by improving access to services and information through the use of digital channels.

Change Management

Additional information was requested on the Change Management plan for the Digital Strategy. Specifically, the question of how we will get buy-in, not only from leaders and management teams, but by front-line staff who will be asked to change the way they work. Additionally, information regarding the timelines associated with change management initiatives was requested.

During the development of the Digital Strategy, communications, presentations and project updates were provided to the City's Leadership team including multiple Digital Strategy Virtual Open Houses. In addition, the City's Leadership team was provided with opportunities for providing input into the strategy and related recommendations. All City Staff were aware of the strategy work underway and had the option to give their input as part of the Digital Strategy Staff Survey. As we move to implement the recommendations and action the initiatives within the Digital Strategy, a more formal, holistic change management plan will be developed. Information on the approach is included below for both the overall Digital Strategy, and individual digital transformation initiatives.
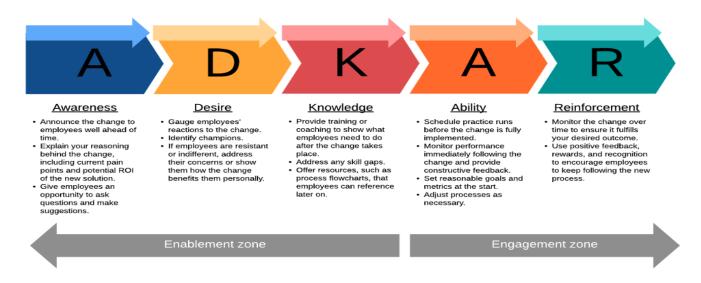
<u>Digital Strategy - Overall</u>

A key strategic initiative identified in Section 8.2 of the Digital Strategy, and one of the first tasks identified in the Implementation Plan (Appendix D) is to develop a change management plan for the Digital Strategy. Discussions are already underway with the Strategic Initiatives & Engagement Division regarding the development of a comprehensive communication plan for the Digital Strategy. The communication plan, along with digital education, digital-first declaration, and mechanisms to explain changes and solicit feedback will be some of the items identified in the Change Management plan. Change management related to the Digital Strategy will span the duration of the Digital Strategy timeline and we will work closely with EMT and all Divisional Management Teams, with the support of Corporate Communications, to communicate the plan and details of its implementation as we proceed.

<u>Digital Transformation Initiatives</u>

For each of the initiatives that we undertake e.g. implementing online building permitting, there will be a change management plan to help all stakeholders – staff, supervisors, managers and leaders, as well as customers of the service adapt to the changes being brought forward. Each project will identify the need for change management and specific plans will be developed. This will be a shared role between CIT and the impacted business unit. Business units will champion and lead adoption, training and change management programs for business specific solutions and business process enhancement. Since each digital transformation initiative will have a change management plan, the timelines for these plans are dependant on the timelines of each project and will be incorporated into the project plans.

<u>Change Management Framework</u>

As identified in Section 4.2.2 of the Digital Strategy, we intend on using the ADKAR framework as a guideline to effectively deploy change management in support of business-technology projects. ADKAR is a goal-oriented change management model designed to guide individual and organization change.

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A question was asked regarding what changes other organizations and partners will need to make to interact with us digitally, and what kind of buy-in to the strategy we could expect.

Consultation with the Thunder Bay Chamber of Commerce, the development and building community and the CEDC suggest that there is a strong demand for the City to provide more digital service delivery. In fact, in many cases, our partners and customers are already working digitally and have to shift to paper to interact with the City, which is a common point of frustration with many.

Some will have to make changes to interact with us digitally but we are not concerned about adoption since in many cases, the City lags behind and is trying to catch up. We will not be on the leading edge of digital service delivery.

Implementation

Additional information was requested on Implementation Approach and Timelines.

Implementation of the work contained within the Digital Strategy is expected to occur over the next 4 years. Section 8.0 of the Digital Strategy outlines the roadmap and staged implementation approach, including major strategic initiatives and projects. An implementation plan is included in Appendix D of the Digital Strategy.

Each year the plan will be reviewed and recalibrated in order to identify new upcoming initiatives and revise the timing of anticipated work. Council will receive an annual report on the Digital Strategy progress.

Governance

The Digital Strategy states "currently CIT is uninvolved in many systems decisions". A question was asked regarding how this would look moving forward, and how/where will CIT be involved.

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Supported by the proposed governance model outlined in Section 4.0 of the Digital Strategy, the recommended approach is that the City establish a process/pipeline for new ideas and concepts that incorporate, or rely on, technology. All opportunities would then be collaboratively reviewed by service owners and IT specialists before budget commitment or implementation.

For instance, the City does not approve construction of buildings without proposed plans and drawings being checked by the building department and the same should be true with technology systems. It is imperative that we confirm sufficient budget and resources to implement systems, that we know what our needs are, that we ensure systems can meet our standards, validate that they can be integrated into our environment and align with our security requirements.

Financial Implications

Additional information was requested regarding Digital Strategy financial implications and budget impact for the next 2 to 3 years.

In 2022, the proposed CIT operating budget includes an increase of $486,000 directly related to the Digital Strategy recommendations. In addition, CIT has included a $500,000 capital project submission to fund Digital Strategy initiatives. As with previous budget submissions, 2022 proposed departmental budgets will include Information Technology projects for Council consideration. These projects are supportive of, and align with, the Digital Strategy.

Appendix D of the Corporate Digital Strategy includes rough order of magnitude budget estimates for some projects identified for 2023 and beyond. Additional work is required to better define those projects prior to finalizing their capital and operating requirements. Required funding for projects identified for 2023 and beyond will be requested through the annual budget process for council consideration.

Corporate Report

DEPARTMENT/ DIVISION	Corporate Services & Long Term Care - Revenue	REPORT	R 178/2021
DATE PREPARED	11/22/2021	FILE	
MEETING DATE	12/20/2021 (mm/dd/yyyy)		
SUBJECT	2022 Interim Tax Levy		

RECOMMENDATION

WITH RESPECT to Report R 178/2021 (Corporate Services & Long Term Care - Revenue) we recommend that the 2022 interim tax levy be established at 50% of the 2021 final tax obligation;

AND THAT the 2022 interim tax levy be due in two installments, March 2 and May 4;

AND THAT the penalty shall be one and one-quarter per cent (1.25%) of the amount in default on the first day immediately following the installment due date for tax installments due in 2022;

AND THAT interest shall be one and one-quarter per cent (1.25%) against all amounts that have become due and remain unpaid. Such interest shall be calculated and imposed on the first day of the calendar month.

AND THAT any necessary by-laws be presented to City Council for ratification.

EXECUTIVE SUMMARY

This report recommends an interim tax levy, due dates, and penalty and interest on tax for 2022.

DISCUSSION

The *Municipal Act, 2001* provides that the interim levy shall not exceed 50% of the total amount of taxes for municipal and school purposes levied on the property for the previous year. In addition, the percentage levied may be different for different property classes but shall be the same for all properties in a property class.

Furthermore, taxes may be billed with a requirement that payment be made in one amount or in a series of installments. Different installments and due dates may also be established for different property classes.

The City of Thunder Bay has historically offered tax payments in four installments, two each for both the interim and final levy. The main advantages of installment billings are:

1. They reduce the cost of current borrowing (or reduce amount of lost interest income) if combined with the use of an interim levy.

2. They provide convenience to taxpayers so that they may budget payments.

3. They provide steady cash flow.

4. They reduce tax delinquency by provision of earlier payments in the year.

Consistent with prior years, Administration is recommending an interim levy of 50% of the 2021 final property tax obligation with installment due dates of March 2 and May 4, 2022.

In 2021, there were 42,900 tax accounts, which generated approximately $232 million in municipal and educational taxes.

Penalty & Interest

The City may impose penalty and interest not to exceed 1.25% for the non-payment of taxes.

Historically the City applies a penalty of 1.25% calculated on the installment amount that is not paid, the day after a tax installment is due.

The City also applies interest of 1.25% calculated on the tax balance that is overdue, on the first of each month. Interest in not calculated on the penalties or interest balance.

Penalty and interest revenue is approximately $2.8 million annually.

Administration recommends a penalty rate of 1.25% and an interest rate of 1.25%.

FINANCIAL IMPLICATION

An interim levy will raise approximately $116,000,000 over two installments.

Penalty on property taxes of 1.25% will generate revenue of approximately $300,000 in 2022.

Interest on property taxes of 1.25% will generate revenue of approximately $2,500,000 in 2022.

CONCLUSION

It is concluded that an interim tax levy, and penalty and interest for non-payment of taxes, as recommended in Report R 178/2021 (Corporate Services & Long Term Care - Revenue) should be approved for the 2022 taxation year.

BACKGROUND

Section 317 of the *Municipal Act* provides authority for Council to levy interim taxes in advance of the adoption of the budget and tax rates for the year. The interim levy is required to provide cash flow to meet current operating requirements.

REFERENCE MATERIAL ATTACHED:

None.

PREPARED BY: KATHLEEN CANNON, DIRECTOR-REVENUE

THIS REPORT SIGNED AND VERIFIED BY:	DATE:
Linda Evans, GM Corporate Services & Long Term Care, City Treasurer	November 26, 2021

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MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Tbaytel Dividend Model

SUMMARY

Report R 189/2021 (Corporate Services & Long Term Care - Financial Services) providing information relative to the above noted and recommending that the Tbaytel Dividend policy be revised. (Distributed Separately)

Corporate Report

DEPARTMENT/ DIVISION	City Manager's Office - Strategic Initiatives & Engagement	*REPORT*	R 143/2021
DATE PREPARED	11/18/2021	*FILE*	
MEETING DATE	12/20/2021 (mm/dd/yyyy)		
SUBJECT	Indigenous Relations & Inclusion Annual Report		

RECOMMENDATION

This report is provided for information.

EXECUTIVE SUMMARY

On November 23, 2020 the Indigenous Relations and Inclusion Strategy (the "IRI Strategy") was adopted by City Council (Report 137/2020). The Strategy implements key aspects of the City's "2019-2022 Corporate Strategic Plan", specifically *Pillar 1 – Lead*. The Indigenous Relations Office (IRO) is responsible for Priority Actions 1 and 2 under this Pillar. The IRI Strategy reaffirms the City's Indigenous relations efforts and articulates how it will further implement the Accord. It guides collective work by supporting City divisions so actions are cohesive and contribute to long-term sustainable outcomes and advancing Indigenous relations in the City of Thunder Bay.

The 2021 IRO Annual Report includes the following:

- An account of activities of the Indigenous Relations office this year;
- An annual update on the IRI Strategy and internal/public engagement progress on the implementation of the Strategy;
- Details of IRO activity to implement the Anti-Racism and Inclusion Accord;
- Synopsis of the In-Depth Analysis of the City's Implementation of the Seven Youth Inquest Recommendations;
- An update on the City's bilateral and multi-lateral relationship agreements;
- A summary of the City's involvement in the First National Day For Truth and Reconciliation; and
- An update on the City of Thunder Bay's Anishinaabe Elders Council.

In March 2021, the IRO increased its capacity by hiring a Policy Analyst – Indigenous Relations, who immediately went to work supporting several important projects including annual reporting on the Seven Youth Inquest, the development of the Resource Guide and website for the Accord, and re-writing the Fort William First Nation Declaration of Commitment, among others. Shortly

after the hiring of the Policy Analyst, the IRO faced capacity challenges due to unexpected leaves of absence. In mid-September, the Indigenous Relations Liaison accepted the position of Acting Manager, Indigenous Relations, and a search for a new manager for the section began. Despite staffing challenges, progress continued on several files and projects including the Accord, bilateral and multilateral agreements such as the Fort William First Nation Declaration of Commitment, and the implementation of the Seven Youth Inquest.

The discovery of unmarked burials at former residential schools across the country influenced the activities of the office, and has brought a new importance to the narrative of Truth and Reconciliation in the community. There has been an encouragingly large number of City staff adopt an Indigenous inclusion lens in their work, which has had positive results in the early implementation of the Indigenous Relations and Inclusion Strategy.

The IRO will continue to build on this year's accomplishments, particularly with Indigenous space and place making initiatives in the City, such as the Medicine Wheel Roundabout, the Northwood Splash Pad, the revitalization of the Spirit Garden, as well as the continued recognition of important dates and anniversaries on the Indigenous calendar.

DISCUSSION

Progress Report on the Indigenous Relations and Inclusion Strategy

The IRI Strategy was adopted by City Council on November 23, 2020. To guide the implementation of the IRI Strategy, comprehensive engagement on the IRI Strategy was to occur from January to April, 2021. This requires input from members of the public with targeted outreach to community partners, both Indigenous and non-Indigenous, and with Indigenous community members. Due to the magnitude of the comprehensive engagement, the timelines to complete the public engagements were extended. The IRO began to engage staff, key partners, and the general public to help determine an engagement plan and implementation priorities. A public engagement and communication plan was developed, along with an internal online staff survey based on the IRI Strategy Pillars. In March 2021, an engagement plan for sessions, as well as draft agendas for each targeted session were finalized with guidance of the Elders Council and key Indigenous partners. Online publications were also developed, as well as additional communication materials. In April 2021 internal engagement started at the executive level with a survey to gauge general understanding of and interest in the four pillars of the IRI Strategy. In September 2021, consulting firm MNP was hired to help facilitate engagement sessions planned for early-to-mid 2022 with community partners, Indigenous community members, and the general public.

After the engagement sessions, MNP will compile findings and prepare an analysis. The IRO will present findings for the implementation plan to Indigenous partners for approval to revise where necessary, as well as present to internal city staff. It is hoped that individual divisions within the City will be able to develop their own Truth and Reconciliation Action Plans based on the information that the IRO gathers during engagement sessions.

To aid in the development of these plans, the IRO is constructing a variety of tools that staff will be able to employ to guide decisions and actions. These include an Indigenous inclusion 'lens', a land acknowledgement guide, an elders protocol, and a smudging protocol, among others. It is anticipated that this bundle will empower all staff to move the Truth and Reconciliation benchmark forward.

The IRO will oversee engagement on the implementation plan of the IRI Strategy, as well as its overall progress against the seven-year cycle. The IRO will continue to report back to Council on progress against the implementation plan on an annual basis.

<div align="center">Progress Report on the Anti-Racism and Inclusion Accord</div>

The Accord provides guidance and accountability to each new member as we move toward inclusion, Truth and Reconciliation. Each Accord signatory commits to address racism by setting short- and long-term goals to meet the calls to action or recommendations in the Truth and Reconciliation Commission (TRC), Missing and Murdered Indigenous Women and Girls Inquiry (MMIWG), and Seven First Nations Youth Inquest (Inquest). Signatories also commit to an ongoing process of developing and maintaining respectful relations with Indigenous partners and individuals.

1. The IRO continues to ensure implementation of the Seven Youth Inquest recommendations. This year marked the fifth year of annual reporting on the implementation of recommendations from the Chief Coroner on the deaths of seven Indigenous youth in the city. At this time, the City has not received this year's grade from Aboriginal Legal Services of Toronto, who are responsible for grading the City on our implementation of the inquest's recommendations. Most of the 31 recommendations directed at the City have been implemented or are in the process of being implemented. For more detail, refer to Corporate Report 79/2021. Only one recommendation remains at the planning stages.

2. With the majority of recommendations complete or nearing completion, it was an opportune time to explore whether the City's implementation of the recommendations had led to meaningful, systemic changes to the way the City operates. In order to ascertain this, IRO staff reviewed recommendations and their associated responses to gauge whether they were: (a) a one time action; (b) ongoing action; or (c) incorporated as a 'standard operating procedure'. Of the 31 recommendations: two were (a), ten were (b), and 19 were (c). We believe that those recommendations that are either ongoing or standard operating procedures are indicative of systemic change, and since the majority of recommendations fall into those categories, it is a sign that systemic change has taken place, although we readily admit that further change and ongoing improvement is still needed. The IRO will continue coordinate the City's implementation of recommendations moving forward and will continue to analyze which of those are to be integrated with the City's ongoing operations.

3. One of the committed actions to implement the Accord was to also conduct a colonial review for the Corporation and assess findings and recommendations. A draft Request for

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Proposals Project Charter for the colonial review was developed. A collaborative effort is now underway with the Office of the City Clerk, Human Resources & Corporate Safety, Legal Services and other internal divisions to move this project forward. A revised proposal for the colonial review of corporate policies, procedures, and other articles to remove barriers is set to be drafted and finalized in Q1 2022.

4. The long-term commitment to have a city-wide Anti-Racism Resource Guide has been completed. The Accord's Resource Guide was recently approved for publication and is in final stages of preparation. The guide was developed for local employers to educate employees and implement the Accord for their respective organization. IRO staff led the working group which developed the Accord's Resource Guide, as well as worked diligently in the development of the Accord Website, which is expected to launch in early 2022.

5. An analysis on the City's response to the three investigations in the Accord has been completed, including the MMIWG Calls for Justice. 33% of TRC Calls to Action are implemented or in the process of being implemented. The City's own implementation of the Accord continues, although a comprehensive plan is still in development under the umbrella of the IRI Strategy. Further analysis of the three investigations is ongoing to ascertain which other TRC Calls to Action are being implemented. Despite this, our implementation of the Seven Youth Inquest recommendations is nearly complete and several individual TRC Calls for Action and MMIWG Calls for Justice are being addressed. The IRO also continues to lead the internal Accord Implementation Working Group where members continue to advise and coordinate efforts from their respective Divisions. Meetings and analysis continue to occur.

6. The renewed mandatory Cultural Awareness Training implementation plan has been revised due to delays in training sessions, in part due to Covid-19, but also due to capacity challenges with facilitators, as well as Division priorities to help meet staff needs. To date, 69% of non-unionized managerial staff have received the training. Strategic discussions are in progress to speed the delivery of this training.

7. It was stated in the IRI Strategy that the Walk-a-Mile training would undergo a comprehensive review, which would include a quantitative study of completed evaluation forms, inventory of training that was completed, and recommendations on the approach for its offering moving forward. This has been postponed due capacity challenges of the IRO.

Relationship Agreements

Over the years the City has signed several bi-lateral and multi-lateral relationship agreements. Until recently most of these were not guided by a comprehensive and consistent approach for implementation. It is hoped that by enshrining these agreements into the Strategy that greater effort will be made to ensure that the commitments made within the agreements are fully implemented in the spirit of each of those agreements.

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Several agreements received attention this year. In particular, the Fort William First Nation Declaration of Commitment Agreement has seen a great deal of progress with regular meetings taking place to discuss several projects of interest to both parties, including the Archaeology Intern Project and initial discussions around the potential use of facilities at Chippewa by Thunderbird Rescue. This table is crucially important for bringing up issues for both parties. Efforts are also currently under way to breathe new life into the North Caribou Lake First Nation Friendship Agreement.

It is important to note that the IRO has fruitful relationships with many Indigenous partners in the City and across the region without having formal, signed agreements. It is the preference of the IRO to continue to nurture these relationships using that approach. This approach has been very successful with Métis Nation of Ontario, Red Sky Independent Métis Nation, and Anishnabek Nation, among others.

National Day for Truth and Reconciliation

The IRO's Indigenous Liaison had great success in bringing many Indigenous partners together to coordinate city-wide activities that took place on the first ever National Day for Truth and Reconciliation. The city-wide committee's main goal was to share resources and ideas, and to bring together in unity organizations interested in holding events. The City's own events, a cedar tree planting campaign and a public screening of the film "Indian Horse", were very successful, with active participation from staff across departments and important buy-in and participation by members of City Council. A public online survey is available on the IRO Orange Shirt Day webpage and is scheduled to launch in early 2022 to measure success of the positive impacts of September 30th list of city-wide activities and events.

The City of Thunder Bay Anishinaabe Elders Council

The Anishinaabe Elders Council (the Elders Council) continues to be instrumental in the operation of the IRO, providing guidance and identifying priorities all the while keeping the work of the office focused on moving priorities forward in a good way. The Elders Council continues to learn about and be interested in the inner workings of the City with individual members providing key support for projects including the Northwood Splash Pad and the Medicine Wheel Roundabout. Currently the Elders Council Terms of Reference are being reviewed and additional guidelines will be implemented based on recommendations from Elders. In an effort to increase the participation of the Elders Council in more projects across the City, the IRO is developing a protocol to help City staff know how, when, and where to effectively include them. It is anticipated that this tool will be ready for use early in 2022.

The Elders Council has also expressed interest in enhancing relationships with City Councillors by inviting Councillors to attend Elders Council meetings, and believes that it is imperative that there continues to be a motion from IRO to City Council to annually confirm the Declaration of Commitment to Urban Indigenous Peoples.

FINANCIAL IMPLICATION

There are no financial implications associated with this report.

CONCLUSION

It is concluded that this report be received for information.

BACKGROUND

On June 19, 2018 the Anti-Racism and Inclusion Accord was signed by the City Manager with Fort William First Nations Management and eight of the city's largest public employers, forming "the Coalition". The Accord commits signatories to report on their respective goals annually in June, this is the third public report for the City of Thunder Bay. Additionally, the Chamber of Commerce has recruited 25 new signatories to the Accord, and efforts are being made to expand the number of organizations that have signed on, although these efforts have largely been ad-hoc.

The Indigenous Relations and Inclusion Strategy was approved by City Council on November 23, 2020 was approved by Council at the Committee of the Whole on November 23, 2020, with Corporate Report No. R 137/2020 (City Manager's Office – Corporate Strategic Services).

Two previous Aboriginal Liaison Strategy plans have guided the actions and decisions of Council and Administration: The 2010-2014 Aboriginal Liaison Strategy, and the 2017-2020 renewed Aboriginal Liaison Strategy.

The annual report on implementation of the Accord and work in principle were approved by Council at the Committee of the Whole on June 24, 2019 with Corporate Report No. R 95/2019 (City Manager's Office – Corporate Strategic Services).
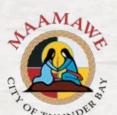

REFERENCE MATERIAL ATTACHED:

INDIGENOUS RELATIONS AND INCLUSION STRATEGY 2021 - 2027

PREPARED BY: TANIS THOMPSON, ACTING MANAGER – INDIGENOUS RELATIONS

THIS REPORT SIGNED AND VERIFIED BY: (NAME OF GENERAL MANAGER)	DATE:
Norm Gale, City Manager	December 10, 2021

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INDIGENOUS RELATIONS
AND INCLUSION STRATEGY:

2021-2027

Executive Summary

Since amalgamation in 1970, the City of Thunder Bay has undergone many changes – from industry, to demographics, and to expansion of services. The political landscape has also evolved, calling upon governments to reconcile relations with Indigenous Peoples. In response, the City of Thunder Bay has dedicated focused efforts to embark on the journey to improve relations and outcomes with Indigenous communities.

Today, Indigenous Peoples in Canada are among the fastest growing and youngest population, with growing numbers pursuing their education. According to the 2016 Census, the city of Thunder Bay has the highest proportion of Indigenous population of any major Canadian municipality (12.7 percent). These demographics reveal a timely opportunity for local growth, but it will largely depend on how the community responds to advancing Indigenous Peoples' inclusion to capitalize on these opportunities.

As a community, we are faced with an important opportunity to dedicate efforts in collaborating and working more effectively with Indigenous partners. The future depends on the City's investment to help to make our city more inclusive and welcoming for all peoples, in particular, for Indigenous Peoples.

Moreover, race should never limit anyone's participation in social, economic and political opportunities. In this spirit, that is why the Corporation of the City of Thunder Bay ("the City") in collaboration with local Indigenous and community partners, drafted and signed onto the City of Thunder Bay Anti-Racism and Inclusion Accord ("the Accord") in 2018. The Accord commits signatories to address racism, and advance inclusion in the city. The City is eager to implement the Accord, of which the foundational groundwork is laid out in this 7-Year Strategy.

The Strategy renews the City's Indigenous relations efforts and implements the Accord. It guides collective work by supporting City divisions so actions are cohesive and contribute to long-term, sustainable outcomes and relations in the city of Thunder Bay.

The Strategy led by City Council and supported by both the Indigenous Relations and Inclusion Section and administration, will serve as a roadmap to operationalize this vision, using a whole-of-government approach. The work will involve participation across divisions, with advisory and liaison support from the Indigenous Relations and Inclusion Section. Process and protocol guidance will also be given by the City's Anishinaabe Elders Council ("Elders Council"). In the spirit of "Maamawe- All Together", the City will demonstrate what can be achieved when working as a team and as leaders in the community.

This Strategy document is the result of reviewing the Aboriginal Liaison Strategy and the Accord with input from the Elders Council, Divisional staff, the Urban Aboriginal Advisory Committee, and participants at the 2019 Open House on Implementation of the Accord. Key aspects of the Thunder Bay Urban Aboriginal Strategy Community Plan (2016-21) were also considered and integrated within this Strategy.

We are embarking on a journey of reconciliation with Indigenous communities. This a responsibility that the City is committed to as demonstrated in this Strategy, while acknowledging its importance to realizing community prosperity. It is our hope that through collective efforts, we will help build a healthy and culturally thriving community- one that is inclusive for all to enjoy well into the future.

Message from the Mayor

On behalf of the City of Thunder Bay and City Council, it is an honour to endorse the City's commitment to further investing in the advancement of our evolving relationship with Indigenous Peoples in Thunder Bay.

The vision Maamawe (All together), as articulated in the Strategy, aligns with the City of Thunder Bay 2019-2022 Strategic Plan's theme: One City, Growing Together. This blending of visions is one way the City has been working diligently to fulfill its commitment to improving relations with Indigenous peoples and newcomers living in or visiting Thunder Bay.

With the release of the 2015 Truth and Reconciliation Commission's Calls to Action, the 2016 Seven Youth Coroner's Inquest Recommendations, and more recently, the National Inquiry into Missing and Murdered Indigenous Women and Girls' Calls for Justice in 2019, we acknowledge the need to fulfill these commitments with more focused attention. To renew our commitment, in 2018, we signed onto the Anti-Racism and Inclusion Accord, and created a senior leadership position to provide overall advice and support to the Corporation as we collectively work towards improving experiences and outcomes for Indigenous Peoples in the city of Thunder Bay in our capacity.

I am pleased to announce the City's renewed 2021-2027 Strategy. The Strategy lays out concrete actions, including updated activities and renewed approaches to better reflect the current landscape, while supporting the City in working more effectively with Indigenous partners and community leaders well into the future.

It is my distinct honour and privilege to introduce the Indigenous Relations and Inclusion Strategy for 2021-2027. It is also my hope that through working together, we can all help build a city that is culturally vibrant, safe, and inclusive for generations to come.

Sincerest wishes,

Mayor Bill Mauro

Current Context

The City has made notable strides in building relations with Indigenous partners and providing more responsive City services (see Appendix: Historical Timeline of City's Role in Fostering Reconciliation). While foundational work has been carried out, more work remains in affecting sustainable, positive change. Below illustrates our Critical Path to see this vision through:

Relationship Building
- Declaration Agreements
- Partner engagement
- Community initiatives
- Public awareness

Dialogue & Partnerships
- Identify priority actions
- Communities of knowledge, practice
- Partnerships on initiatives
- Public and staff education

Implementation Planning & Execution
- Sustainable approaches
- Improve outcomes through sequenced actions
- Report on progress
- Performance measurement & monitoring

Through the former Aboriginal Liaison Office (established 2008), many advances were made in establishing and fostering relations with Indigenous partners and service providers in Thunder Bay. The Indigenous Liaison role has also laid the foundation for honouring Indigenous spaces and contributions to be recognized for years to come, most notably, the Residential School Memorial, installed in 2019.

When the role of the Aboriginal Liaison was created, the need for an Elders Advisory Council was quickly identified. The now referred to Anishinaabe Elders Advisory Council is a fundamental guid for connecting with Indigenous communities while providing overall advice to the City on matters of protocol, and traditional practices.The title of Anishinaabe Elders Council was passed in its Terms of Reference in 2019 to reflect the traditional territory where Thunder Bay is situated upon and the Original peoples of this area pre-contact.

Key recent events have influenced how the City has evolved its approach in advancing Indigenous relations and anti-racism. Racism has been a matter of grave local concern, as, cited by media outlets and recommendation reports. Recently, the 2016 Coroner's Inquest Report into the Seven Youth (Inquest) who lost their lives in Thunder Bay was considered a catalyst to using more coordinated approaches in response to local needs. Since then, systemic change has taken place in the City's operations, as it continues to implement the Inquest recommendations and collaborate with local partners on efforts.

The City also affirmed its support of advancements made through the Indigenous Liaison Office, and built on those foundations by creating the Indigenous Relations and Inclusion Manager role and Section. The Section will offer overall strategic guidance and support to the Corporation, coordinate the Elders Council, and in collaboration with staff and Indigenous partners, develop policy foundations to entrench this important work, while continuing to advance reconciliation and improved community relations for future generations.

Alignment with City of Thunder Bay's Strategic Plan:

This Strategy aligns with the City's overarching 2019-2022 Strategic Plan, *One City Growing Together*. Pillar 1 of its Strategic Plan reads as follows:

Lead: Provide civic leadership to advance mutual respect, equal opportunity and hope.

1. *Seek advice and work collaboratively with Indigenous partners to deepen relationships and further reconciliation.*
2. *Fulfill our commitments to Indigenous and racialized persons under the Thunder Bay Anti-Racism and Inclusion Accord.*

Implementation of the Indigenous Relations and Inclusion Strategy involves working with Indigenous partners and engaging community members to inform the City's actions under each Pillar.

One of the City's priorities will be strengthening staff capacity through training to better equip teams to work more effectively with Indigenous Peoples.

The Strategy incorporates the Anti-Racism and Inclusion Accord's objectives in its activities throughout, as the commitments guide each Strategy pillar. The City will be analyzing all Investigations cited in the Accord for implementation across divisions.

A Move to Proactive Measures Leading to Sustainable Outcomes:

Feelings of exclusion & experienced racism

Poverty & loss of hope in opportunities

Culture shock & barriers to access

Community division on issues & lack of trust among citizens

→

Daily interactions of felt inclusion & dignity

Inclusive spaces & opportunity for prosperity

Accommodation & equitable access

Community consciousness raised & unity on issues, instilling pride as citizens

The Work Plan

Vision: Guided by the City of Thunder Bay Anishinaabe Elders Council and local Indigenous community, the Indigenous Relations and Inclusion Section supports the City's enhancement of its relationship with Indigenous partners and communities, while advancing Indigenous Peoples' inclusion in the City's opportunities and growth.

Values and Guiding Principles:
The Seven Grandfather Teachings are sacred, Indigenous governing principles of the Anishinabek, the Original Peoples of this region. These Teachings will guide the Section's work and conduct in serving the local Indigenous community in a meaningful way in the spirit of Mino-Bimaazdiwin (Good Life):

1. **Respect – Mnaadendimowin:** to welcome and value contributions of all in advancing Indigenous relations and inclusion.

2. **Honesty – Gwekwaadziwin:** to follow through on commitments while being accountable to Indigenous communities in decision-making and reporting.

3. **Humility – Dbaadendiziwin:** to collaborate and build effective working relations with Indigenous partners and local organizations in advancing mutual goals.

4. **Love – Zaagidwin:** to serve the public and approach priorities with integrity and compassion.

5. **Bravery – Aakwa'ode'ewin:** to advocate to governments and community members to better address priorities of Indigenous peoples in the city of Thunder Bay.

6. **Truth – Debwewin:** to heighten public awareness and dialogue through sharing stories and knowledge, while affirming Indigenous peoples' rightful place.

7. **Wisdom – Nbwaakaawin:** to strengthen our knowledge base by seeking out learning and networking opportunities that support our work.

Strategic Approach:

The areas of focus will be addressed through four strategic goals to inform the City's work. Commitments and actions are informed by policy recommendations of commissioned reports relevant to a municipal setting and cited in the Anti-Racism and Inclusion Accord, which includes:

• United Nations Declaration on the Rights of Indigenous Peoples;

• Truth and Reconciliation Commission of Canada;

• Office of the Chief Coroner Inquest on the Seven First Nations Youth;

• National Inquiry into Murdered & Missing Women & Girls; and

• Relationship agreements the City of Thunder Bay has with Indigenous partners.

By embracing our guiding principles, engagement with the Indigenous community will be critical to the Strategy's success. The Strategy will be reviewed annually to assess progress and prioritize actions for the next working year with resources identified.
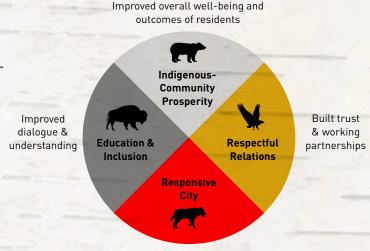
Strategic Goals and their Objectives:

1. Respectful Relations: Foster collaborative and respectful relations with Indigenous community, partners and nations.

2. Responsive City: Support City capacity to further inclusion by offering informed advice and support.

3. Education & Inclusion: Enrich public dialogue and knowledge on Indigenous topics with Indigenous partners in Thunder Bay.

4. Indigenous-Community Prosperity: Promote well-being of Indigenous peoples in Thunder Bay through promotion of welcoming spaces and improving access to services.

Strategic Goals and their Anticipated Outcomes:

Improved overall well-being and outcomes of residents

Indigenous-Community Prosperity

Built trust & working partnerships

Respectful Relations

Improved dialogue & understanding

Education & Inclusion

Responsive City

Empowered public service & use of informed approaches

Pillar 1: Respectful Relations

Strategy Commitments:

United Nations Declaration on the Rights of Indigenous Peoples, Article 18: Indigenous Peoples have the right to participate in decision-making in matters which would affect their rights, through representatives chosen by themselves in accordance with their own procedures, as well as to maintain and develop their own indigenous decision-making institutions.

Truth and Reconciliation of Canada, Call to Action 57, Seven Youth Coroner's Inquest, Recommendation 139: ...Provide education to public servants on the history of Aboriginal Peoples, including the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaties and Aboriginal rights, Indigenous law, and Aboriginal–Crown relations.

Declaration of Commitment: Strengthening the Relationship between Fort William First Nation and the City of Thunder Bay: Collaborate on outstanding issues to our mutual benefit.

Commitment 1: Implement relationship agreements with Indigenous partners

   1.1 Analyze and develop a work plan to operationalize City-signed relationship agreements and publicly-declared commitments.

   1.2 Dialogue and report annually on progress on implementing agreements with partners.

Commitment 2: Honour & foster relations with Fort William First Nation, Metis, and local Indigenous Partners

   2.1 Present motion for Council to annually confirm Declaration of Commitment to Urban Aboriginal Peoples.

   2.2 Facilitate effective working relations between the City and Indigenous partners.

      (a) Liaise with Fort William First Nation, Red Sky Metis Independent Nation, Metis Nation, and Indigenous partner staff to strengthen working relations.

      (b) Appoint Council member to attend Elders Council meetings.

Commitment 3: Guide & support City leadership and staff in advancing Indigenous Relations

   3.1 Provide professional learning opportunities and supports to empower leadership and administration to build effective working relations with Indigenous partners.

      (a) Renew and deliver Indigenous Cultural Awareness and other relevant learning opportunities to City Council and staff.

      (b) Evaluate Walk-a-Mile training to respond to evolving needs with Indigenous community input.

   3.2 Confirm appropriate engagement approaches with Indigenous partners.

      (a) Draft a guidance document and deliver staff training on engagement with Indigenous partners and communities.

2 Pillar 2: Responsive City

Strategy Commitments:

United Nations Declaration on the Rights of Indigenous Peoples, Article 15.2: States shall take effective measures, in consultation and cooperation with the Indigenous Peoples concerned, to combat prejudice and eliminate discrimination and to promote tolerance, understanding and good relations among Indigenous Peoples and all other segments of society.

United Nations Declaration on the Rights of Indigenous Peoples, Article 8.2: States shall provide effective mechanisms for prevention of, and redress for: (a) Any action which has the aim or effect of depriving them of their integrity as distinct Peoples, or of their cultural values or ethnic identities.

Seven Youth Coroner's Inquest, Recommendation 145: Revise current policies to reflect new tasks and procedures where Recommendations are accepted.

Commitment 4: Implement Anti-Racism & Inclusion Accord

4.1 Conduct a systemic review of corporate policies and procedures and other articles to address racism and barriers through a third-party process.

   (a) Conduct audit to identify priority areas of action and redress.

4.2 Facilitate Accord Implementation Working Group to create inventory of City efforts to date, and develop a long- and short-term anti-racism action plan.

   (a) Analyze Accord commitments for City implementation.

   (b) Explore enhanced Anti-Racism resources for staff with partners.

4.3 Facilitate Resource Guide Working Group to support Accord signatory organizations'members' (Coalition) implementation.

4.4 Support Coalition efforts and Accord awareness through communications methods.

Commitment 5: Inclusive research & policy development

5.1 Where required, develop practices and procedures that enhance inclusion and training (i.e., Smudging Protocol, Land Acknowledgments, etc.).

5.2 Conduct up-to-date research and analysis on Indigenous issues to support the City's objectives and provide effective advice to the Corporation.

Commitment 6: Promote workplace diversity & inclusive employee supports

6.1 Revive and coordinate City Indigenous Employees' Network to identify priorities and engage staff for further retention.

6.2 Collaborate with Well at Work, Health & Wellness Coordinator to develop culturally responsive staff supports (e.g., Elder support hours, promote available cultural programming).

6.3 Collaborate with Human Resources to enhance Indigenous recruitment and retention.

   (a) Create responsive recruitment activities in partnership with Indigenous employment agencies.

   (b) Advise on employment equity studies and implementation of workforce diversity.

3

Pillar 3: Education & Inclusion

Strategy Commitments:

Seven Youth Coroner's Inquest, Recommendation 110: ...Incorporate better reflection of Indigenous presence in the territory for millennia.

Fort William First Nation-City of Thunder Bay-Nishnawbe Aski Nation Statement of Commitment to First Nation Youth and Families: Develop anti-racism campaign to raise awareness and eliminate racism against Indigenous people in Thunder Bay by challenging racist, hateful, ignorant discourse directed toward Indigenous people; address systemic racism in organizations and institutions in our community.

Declaration of Commitment- Strengthening Relationships between the City of Thunder Bay and Urban Aboriginal People: Partner with Aboriginal Peoples in creating an inclusive community that values and respects the diversity that exists in the City of Thunder Bay.

Commitment 7: Collaborate with partners on public awareness activities to promote Indigenous inclusion and address racism in the community.

7.1 Continue supporting Indigenous-led community gatherings that support Indigenous inclusion.

7.2 Continue to honour commemorative days (e.g., Louis Riel Day; Indigenous Peoples' Month; Orange Shirt Day; Treaties Recognition Week).

7.3 Support speaking engagements and awareness campaigns when requested.

Commitment 8: Honour & celebrate Indigenous space & place

8.1 Collaborate with staff on City-led initiatives that promote Indigenous inclusion (e.g., Women's History Month, local awards, Committees, etc.).

8.2 Honour Indigenous history and culture in City spaces through exhibits and activities.

8.3 Collaborate on new place-making initiatives and opportunities for welcoming spaces in the city.

    (a) Conduct research in collaboration with academic and Indigenous partners to identify Indigenous heritage recognition opportunities in City spaces.

    (b) Maintain and enhance existing place-making spaces.

4

Pillar 4: Indigenous-Community Prosperity

Strategy Commitments:

United Nations Declaration on the Rights of Indigenous Peoples, Article 21.2: States shall take effective measures and, where appropriate, special measures to ensure continuing improvement of their economic and social conditions. Particular attention shall be paid to the rights and special needs of indigenous elders, women, youth, children and persons with disabilities.

Missing and Murdered Indigenous Women and Girls Inquiry Report Call for Justice #3.1: ...Ensure that the rights to health and wellness of Indigenous Peoples, and specifically of Indigenous women, girls, and 2SLGBTQQIA people, are recognized and protected on an equitable basis.

Declaration of Commitment – Strengthening Relationships between the City of Thunder Bay and Urban Aboriginal People: Work with Aboriginal Peoples to identify and assist with the removal of barriers that hinder their full participation in community life.

Fort William First Nation-City of Thunder Bay-Nishnawbe Aski Nation Statement of Commitment to First Nation Youth and Families: Provide leadership, in the spirit of Treaty and reconciliation, to support and enable local governments, municipal leaders and community members to address this crisis with the goal of creating a safe and welcoming community for all.

Commitment 9: Provide guidance to make City services responsive to needs of Indigenous Peoples

9.1 With Elders Council guidance, identify ways to offer and promote equitable access.

(a) Advise on programs, proposals and process improvements.

(b) Develop a welcome kit for Indigenous newcomers to the city.

9.2 Promote role models and mentorship opportunities for Indigenous residents.

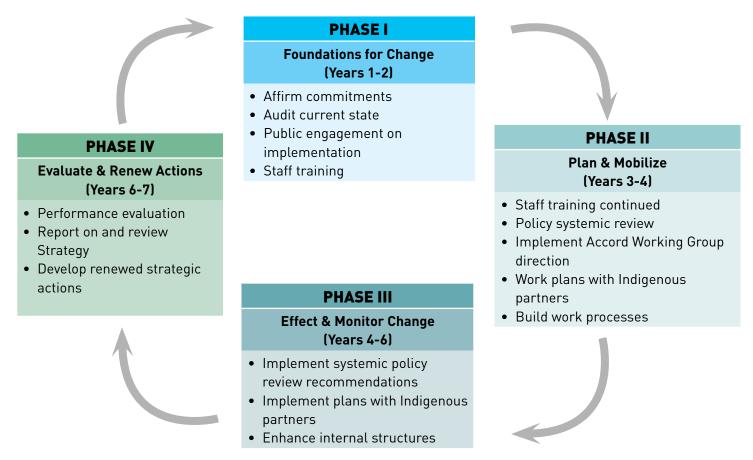**Commitment 10: Improve outreach & communications on City services**

10.1 Support collaborative approaches for orientation activities for First Nations students from remote communities attending school in Thunder Bay.

10.2 Improve communication and outreach on initiatives and funding opportunities.

10.3 Update the City Indigenous Relations and Inclusion website and public-facing communication materials.

Commitment 11: Advocate & work with governments & local partners to improve outcomes

11.1 Continue collaborative relationship with and seek ongoing advice from the Thunder Bay Urban Aboriginal Advisory Committee on priorities of mutual interest.

11.2 Work with local partners to support enhanced coordination of existing efforts and services for Indigenous peoples in Thunder Bay.

11.3 Strengthen relationships with provincial and federal partners to collaborate while leveraging investments.

Setting Plans into Action: Implementation Plan

Community engagement and reporting to City Council will be conducted annually.

PHASE I
Foundations for Change
(Years 1-2)

- Affirm commitments
- Audit current state
- Public engagement on implementation
- Staff training

PHASE II
Plan & Mobilize
(Years 3-4)

- Staff training continued
- Policy systemic review
- Implement Accord Working Group direction
- Work plans with Indigenous partners
- Build work processes

PHASE III
Effect & Monitor Change
(Years 4-6)

- Implement systemic policy review recommendations
- Implement plans with Indigenous partners
- Enhance internal structures

PHASE IV
Evaluate & Renew Actions
(Years 6-7)

- Performance evaluation
- Report on and review Strategy
- Develop renewed strategic actions

Determining Factors for Success:

- **Committed to Change:** Supported by leadership, while fostering effective relations

- **Accountable:** Informed by Indigenous partners and supportive community partners

- **Leverages Investments**: Provincial and federal commitment to supporting initiatives

- **Capitalizes Expertise:** Strategic partnerships and building communities of practice

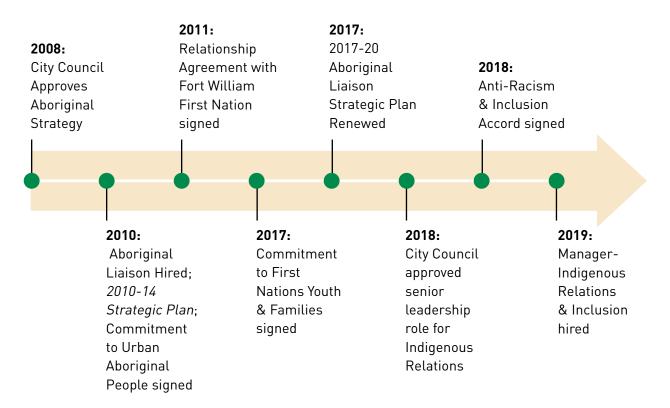- **Founded on Common Understanding:** Goals, outcomes, and scope are clarified

Performance Measurement Guidelines

- Apply Indigenous research methods while respecting OCAP™ (Ownership, Control, Access and Possession) principles.

- Based on key outcome areas: Social, Economic, Environmental, and Cultural.

- Identify key performance indicators (KPIs) with Indigenous partner input.

- Flexibility to modify activities where needed upon regular monitoring.

Appendix

Historical Timeline of the City's Role in Fostering Reconciliation

2008:
City Council Approves Aboriginal Strategy

2011:
Relationship Agreement with Fort William First Nation signed

2017:
2017-20 Aboriginal Liaison Strategic Plan Renewed

2018:
Anti-Racism & Inclusion Accord signed

2010:
Aboriginal Liaison Hired; *2010-14 Strategic Plan*; Commitment to Urban Aboriginal People signed

2017:
Commitment to First Nations Youth & Families signed

2018:
City Council approved senior leadership role for Indigenous Relations

2019:
Manager-Indigenous Relations & Inclusion hired

Thunder Bay Anti-Racism & Inclusion Accord

Our Shared Future Rooted in the Truth of Our Past and Our Commitment to Mutual Respect, Equal Opportunity and Hope

We, the undersigned, are committed to put into action commitments established by the Thunder Bay Coalition for Anti-Racism & Inclusion (Coalition), which consists of organizations, groups, and individuals in Thunder Bay. This Accord is intended to be a living document that is not a single-time event, but an ongoing responsibility accepted by the undersigned who, through collaboration and mutual respect, commit to establish goals and report on successes. It is also an ongoing invitation to other sectors, organizations, groups and individuals in Thunder Bay to collaborate with and commit to the Coalition.

We acknowledge that Thunder Bay is built on the traditional territory of Fort William First Nation, signatory to the Robinson-Superior Treaty of 1850. It is a city where diverse Indigenous Peoples have taken residence. Immigrants, from multigenerational to newcomer, have also chosen to reside in the city. Thunder Bay has a history that includes European settlement and colonization. In recognition of its diversity, we aspire Thunder Bay to be a protective and inclusive environment for all.

Furthermore, we acknowledge that colonization contributes to systemic racism against Indigenous and racialized communities. Racism threatens the welfare of all community members and is compounded by discrimination that is based on sex, gender, age, creed, class, ability, sexuality, family status, and their intersections. As a Coalition, guided by the Ontario Human Rights Code, the Canadian Charter of Rights and Freedoms, and international human rights instruments including the Declaration on the Rights of Indigenous Peoples, and the International Convention on the Elimination of All Forms of Racial Discrimination. Efforts to address systemic racism and injustices committed against Indigenous and racialized persons have been examined but, for the purposes of this Accord, we draw particular attention to: (1) the Seven First Nation Youths 2016 - Inquest - Office of the Ontario Chief Coroner, (2) the National Inquiry into Missing and Murdered Indigenous Women and Girls and, (3) the Truth and Reconciliation Commission of Canada (the "Three Investigations").

We are committed to an inclusive society for all members of the Thunder Bay community, in keeping with the domestic and international human rights instruments named above. Guided by calls to actions and recommendations made by these Three Investigations, we further commit to advancing equity and diversity in the sectors of governments, education, children & youth services, health services, municipal services, emergency services, libraries, and business, as well as at the individual level.

This pledge is actualized by the following commitments of action:

Each organization commits to:
1) Address racism against Indigenous and racialized persons by setting short- and long-term goals to meet the calls to action or recommendations in one or more of the Three Investigations listed above.
2) Support an ongoing process of truth & reconciliation throughout their organization and in our community by developing and maintaining respectful relations with Indigenous governments, organizations and individuals.
3) Report on our goals annually, beginning in June 2019.

As a Coalition we will:
1) Develop and maintain a Thunder Bay Anti-Racism Accord Resource Guide to support the coordination of the Accord.
2) Meet our commitments by working collaboratively, both internally in our organizations and throughout the community.

Norm Gale
City of Thunder Bay

Sylvie Hauth
Thunder Bay Police Service

David Paul Achneepineskum
Matawa First Nations Management

Ken Adams
Confederation College

Pino Tassone
Thunder Bay Catholic District School Board

Lisa Beckwick, St. Joseph's Care Group

Ken Ogima
Fort William First Nation

John Pateman
Thunder Bay Public Library

Moira McPherson
Lakehead University

Ian MacRae
Lakehead Public School Board

Jean Bartkowiak
Thunder Bay Regional Health Sciences Centre

CITY OF THUNDER BAY
CITY MANAGER'S OFFICE
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MEMORANDUM

TO:	Krista Power, City Clerk
FROM:	Tracie Smith, Director - Strategic Initiatives & Engagement
DATE:	November 16, 2021
RE:	Report R 143/2021 (City Manager's Office - Strategic Initiatives & Engagement) Indigenous Relations and Inclusion Annual Report and Strategy Committee of the Whole - December 20, 2021

I would like to request the opportunity to provide a presentation relative to Report R 143/2021 (City Manager's Office – Strategic Initiatives & Engagement) an annual progress report on implementation of the City of Thunder Bay Indigenous Relations and Inclusion Strategy at the December 20, 2021 Committee of the Whole meeting.

The 2021-2027 Indigenous Relations and Inclusion Strategy was developed with the City of Thunder Bay Anishinaabe Elders Council through consultation with members of City Council, Executive Management Team, key divisional staff, and Indigenous partners through individual meetings.

City Manager Norm Gale will provide introductory remarks and introduce the presenters, Tracie Smith, Director - Strategic Initiatives & Engagement, Tanis Thompson, Acting Manager – Indigenous Relations and Alain Joseph, Policy Analyst – Indigenous Relations.

Cc: Norm Gale, City Manager

DEPARTMENT/ DIVISION	City Manager's Office - Strategic Initiatives & Engagement	REPORT	R 166/2021
DATE PREPARED	11/15/2021	FILE	
MEETING DATE	12/20/2021 (mm/dd/yyyy)		
SUBJECT	City of Thunder Bay 2019-2022 Corporate Strategic Plan Third Progress Update		

RECOMMENDATION

For information only.

LINK TO STRATEGIC PLAN

The Third Progress Update gives a high-level overview of progress to-date on priority actions from the approved 2019-2022 Corporate Strategic Plan and 14 recommendations from the City's Program and Services Review which were approved for action by City Council (R144/2020).

EXECUTIVE SUMMARY

The 2019-2022 City of Thunder Bay Strategic Plan guides the decisions and actions of City Council and Administration during this term of Council.

This Report presents the third progress update report at November 1, 2021 (Attachment A).

DISCUSSION

A Long-Term Vision – One City, Growing Together

The City's Strategic Plan guides the decisions and actions of City Council and Administration for the current term of Council.

While the "2019-2022 Corporate Strategic Plan: One City, Growing Together" coincides with the term of Council and is a corporate document intended to guide the work of internal Departments and Divisions, its goals are longer term and reflect the community's input. The input and ideas brought forward through the engagement process were documented in Corporate Report R72/2019, when the Strategic Plan was presented for approval in October 2019. The Strategic Plan presents goals under four pillars: Lead, Serve, Grow, and Renew.

Under each pillar there are strategy statements and priorities to guide movement toward achieving the long-term goal. As well, there are strategic questions to guide decision making as opportunities emerge.

The Revised Implementation Plan – 2019-2022 Corporate Strategic Plan: Once City, Growing Together (R89/2021) includes 14 recommendations from the City's Program and Services Review which were approved for action by City Council (R144/2020). These Program and Services Review Strategic Actions were incorporated into their own identifiable section under the pillars of Serve, Renew and Service Excellence.

The Third Progress Update at November 1, 2021, provides a high-level overview of progress on all of the priority actions from the Revised Implementation Plan.

It is important to remember the Strategic Plan is not intended to reflect everything the City of Thunder Bay does for its citizens on a daily basis as a municipal government. The City provides a wide-range of important services and facilities that are essential to the quality of life in Thunder Bay. City Council, management, and staff are committed to maintaining these vital services and facilities. The Strategic Plan provides a focus on enabling change and continuous improvement through a phased implementation of plans, partnerships and timely actions to create the results the community wants: *One City, Growing Together.*

Progress Reports and Communication

The Third Progress Update (Attachment A) document will be added to the City's website at thunderbay.ca/stratplan.

The final update on the Corporate Strategic Plan will be presented in June 2022.

FINANCIAL IMPLICATION

Where the goals and priority actions have financial implications they will be brought forward to Council for approval as required through the annual budget process.

CONCLUSION

It is concluded that Administration will continue to provide semi-annual progress reports on the implementation of the Strategic Plan, including the addition of strategic actions accepted for implementation from the City's Program and Services Review. These progress reports will be presented to Committee of the Whole and posted to the City's website. It is further concluded that this Report should be received for information only.

BACKGROUND

Municipal Strategic Planning is an important process to advance the shared goals of the community, Council and Administration. Benefits include more effective resource allocation, a clear focus and direction, a guide for decision making, a sense of accomplishment as milestones are reached, improved communication among Council, Administration and the community, and flexibility to respond to changing community needs. Effective corporate strategic plans address 'change' through a rational and structured framework coupled with a dynamic and responsive sense of direction.

Four previous Strategic Plans have guided the actions and decisions of Council and Administration: The 2004-2006 New Foundation Strategic Plan, the 2007-2010 Building on the New Foundation Strategic Plan, the 2011-2014 Strategic Plan, and the 2015-2018 Becoming our Best Strategic Plan.

The 2019-2022 Strategic Plan was presented to Committee of the Whole on October 17, 2019, with Corporate Report R72/2019 and approved.

The Implementation Plan – 2019-2022 Corporate Strategic Plan and first progress updated was presented to Committee of the Whole on October 26, 2020, with Corporate Report R123/2020.

Administration's recommendations on implementation of the City's Program and Services Review and incorporation into the Implementation Plan for the 2019-2022 Strategic Plan was presented to Committee of the whole December 9, 2020, with Corporate Report R144/2020 and approved.

The Revised Implementation Plan – 2019-2022 Corporate Strategic Plan which incorporated recommended actions from the City's Program and Services Review, and the second progress update was presented to Committee of the Whole on June 28, 2021, with Corporate Report R89/2021.

REFERENCE MATERIAL ATTACHED:

Attachment A – Third Progress Update at Nov. 1, 2021

PREPARED BY: TRACIE SMITH, DIRECTOR – STRATEGIC INITIATIVES & ENGAGEMENT AND JODI WRIGHT, COMMUNICATIONS SPECIALIST – STRATEGIC INITIATIVES & ENGAGEMENT

THIS REPORT SIGNED AND VERIFIED BY: (NAME OF GENERAL MANAGER)	DATE:
Norm Gale, City Manager	December 10, 2021

Page **3**

2019-2022 Strategic Plan

THIRD PROGRESS UPDATE

Including Program & Services Review Strategic Actions
(Based on status at Nov. 1, 2021)

December 20, 2021, Committee of the Whole

One City, Growing Together 2019-2022 Strategic Plan

Our vision for Thunder Bay is One City, Growing Together. Thunder Bay will foster an inclusive city focused on service excellence and partnerships to provide a high quality of life to our citizens. We embrace and celebrate our diversity as it makes our community a vibrant and dynamic place to grow.

The Strategic Plan aims to achieve this vision by focusing on civic leadership, service excellence, and city growth and renewal. Through the Strategic Plan we have identified key priorities to guide decision making and provide a framework for requests to City Council. These priorities include: growth and prosperity, community safety and well-being, cost-effective and quality services to citizens, financial sustainability to provide and maintain service and infrastructure levels, and environmental stewardship. These priorities are considered in each project undertaken by the City to further the Strategic Plan.

Implementation Plan

A revised Implementation Plan for the Strategic Plan outlines the strategic actions to be achieved from 2019 – 2022, and includes 14 additional strategic actions incorporated based on recommendations from the City's recent Program & Services Review which were approved in December 2020 by City Council *[Corporate Report R144/2020]*. Each strategic action identifies the goal it furthers (lead, serve, grow, or renew), and is accompanied by priority actions and success measures.

Key Indicators

These indicators will be used to measure the results of the 2019 – 2022 Strategic Plan.

- Assessment growth
- Building construction value & permits
- Completion of projects
- Quality of life rating

- Satisfaction with services
- Sense of belonging
- Sense of safety rating
- Value for tax dollars rating

Key indicator data is collected from multiple sources including the Citizen Satisfaction Survey, Statistics Canada, and internal City Departments.

The Citizen Satisfaction Survey is conducted every two years. However, due to the COVID-19 pandemic and to better align with strategic planning, the Survey has been deferred by one year to be completed in 2022, and will continue on biennially.

Measures of the key indicators will be presented in the final Strategic Plan Report (June 2022). At that time the most current data will be available including results of the 2022 Citizen Satisfaction Survey.

Progress Update

This third progress update as of Nov. 1, 2021, provides the progress, actions, measures and results on each of the Implementation Plans' strategic priorities. This includes the 14 additional items incorporated from the City's Program & Services Review.

LEAD - Provide civic leadership to advance mutual respect, equal opportunity and hope.

1. Seek advice and work collaboratively with Indigenous partners to deepen relationships and further reconciliation.

Ongoing

Draft Implementation Plan with Fort William First Nation **accepted by both parties**.

Committee with 14 Indigenous partners established for **city-wide approach** to Orange Shirt Day/National Day for Truth and Reconciliation.

69% of non-union managerial staff completed Indigenous Cultural Awareness Training. Sessions set into 2022 for outstanding employee groups.

Public engagement sessions set for Q1 2022 to inform the IRI Strategy Implementation Plan.

Three new Indigenous inclusion dedicated spaces, **five in progress**, and **two in consultation** with Indigenous partners.

Infrastructure projects incorporating Indigenous spaces with guidance from the City's Anishinaabe Elders and Indigenous partners.

2. Fulfill our commitments to Indigenous and racialized persons under the Thunder Bay Anti-Racism and Inclusion Accord.

Ongoing

Draft Indigenous Inclusion Lens completed and undergoing review by Accord Working Group.

Draft proposal for systemic review of corporate policies, procedures, and other articles to address racism and barriers completed, to be **finalized in the first half of 2022** to align with other activities in this area.

Analysis of **three investigations in Accord ongoing**. Similar analysis underway for **MMIWG Calls for Justice**.

Thunder Bay Anti-Racism & Inclusion Accord **Implementation Resource Guide developed**. **33%** of the TRC Calls to Action have been implemented or are in progress.

New Indigenous Relations website area launch April 2021, **97% increased traffic** over last year.

Indigenous Relations Facebook Page has **703 Likes** and **843 Followers.**

3. Collaborate with other institutions and partners in our city to articulate a shared vision.

Deferred

Delayed due to impacts of COVID-19. The City Manager **continues to collaborate with community partners** to advance mutual priorities.

4. Provide opportunities for residents to express their civic pride.

Ongoing

50th Anniversary Work **Plan implemented,** including Jan. 1, 2020, **Community Celebration**. 50th theme incorporated into several **online City events**. Planned schedule of additional events disrupted due to COVID-19.

50th Anniversary sign and graphic installation completed in October 2021 in the **City Hall Lobby** as part of the legacy.

Re-marketing of the 'I Choose TBay' promotional video **explored in April 2022** to coincide with Civic Pride month. Civic pride continues to be **underscored in Tourism promotion** – See RENEW, Strategic Action 5.

Tourism's **Tbaycation campaigns continued during Q2 and Q3 2021**. Ontario's reopening plan guidelines shifts marketing back to inbound visitor markets for Q4 and 2022.

5. Further our commitments to sustainability and climate adaptation.

Ongoing

Climate-Forward City: Thunder Bay Net-Zero **Strategy endorsed by City Council June 2021.**

Implementation of Climate Adaptation **Strategies ongoing**. **Annual update** presented to City Council **November 2021**. Work continues on the pilot of the RPWCO* climate resilience roadmap as well as climate related emergency exercises which are supported by **$155,000 in secured Provincial funding**.
Regional Public Works Commissioners of Ontario

2014 to 2020 **Sustainability Plan Progress Update** presented to City Council **July 2021**. Update and **renewal** of the Plan anticipated completion **June 2022**.

SERVE - Advance service excellence through a citizen focus and best use of technology.

1. Conduct an independent review of the programs and services (PSR) the City provides, how it provides them, and recommendations for what to maintain, change, reduce or enhance and propose changes to improve service.

→ Ongoing

PSR - Phase 1 **Report completed** November 2019.

PSR - Phase 2 **Report completed** June 2020.

Administration has started **implementation work related to 13 of the 14 recommendations** approved by Council. Remaining items will be explored in the coming year.

Financial implications, both operating and capital, will be **included in the 2022 and future year proposed budgets** for Council consideration.

2. Support the review through a public engagement plan that engages stakeholders and considers the service needs of residents and customers along the spectrum from youth to older adults.

✓ Achieved

A Public **Engagement Plan was implemented** in November 2019 for the Phase One Report including internal and external surveys by Grant Thornton, two public open houses at City Hall, and updates on thunderbay.ca/GetInvolved which saw page **traffic of over 1,000 visits**.

A Public **Engagement Plan was implemented** April - July 2020 for the Phase Two Report including an online **survey with 780 respondents, public comment period with 104 respondents**, and **webpage traffic of over 5,800 visits**. In-person engagement was not possible due to COVID-19.

Public comment **reports were provided to Council** in advance of the September 2020 Special Committee of the Whole Meeting.

3. Review points of contact with customers to identify better ways of serving the public that are inclusive and easy to use.

⋯ Deferred

A service counter review will be **carried out in 2022.**

The proposed Digital Strategy will be **presented to City Council November 2021**. See PSR SERVE, Strategic Action 2.

Actions to implement changes and assess customer satisfaction have been **deferred to 2022**.

4. Develop an open data platform to make it easier for interested users to engage with City data and create opportunities for engagement.

✓ Achieved

Open Data Administrative Committee **established May 2019** and a portal implementation **roadmap completed July 2019**.

Required technology implemented to build the portal and a **governance framework developed** including an Open Data Policy and Open Data Licence, **June 2020.**

Portal launched November 2020. Since launch, an additional **two datasets have been added**, and **two datasets are pending** approval by end of year 2021. There have been **6,400 visits** to the portal with close to **250 downloads** to date.

Committee meets on an ongoing regular basis to **review and action requests, approve datasets, and consider additional datasets** to be made available on the Portal.

GROW - Focus on city building and social infrastructure to strengthen our economy, lifestyle and well-being.

1. Support and work with the CEDC in the execution of its 2019-2022 Strategic Action Plan and immigration pilot. Advocate to provincial, federal and industry leaders on economic opportunities and key priorities including retention of manufacturing jobs.

→ Ongoing

RNIP* Year 2 – **96 recommendations, six newcomers, 73 active employers. 180 applicants** approved.
Rural & Northern Immigration Pilot

2021: Starter Company Plus – **10 entrepreneurs, $50K in grants, leveraged $868K**. Summer Company – **nine students, $25,500 in grants**.

The CEDC received a **$68,760 grant** from OBIAA*. The grant has been used to hire a **local team of five experts.**
Ontario Business Improvement Area Association

NW Ontario Mining Readiness – **3,600+ jobs for six mines. 850 positions** with Thunder Bay residents.

Work from Thunder Bay social media campaign – **730,000+ impressions, 9,000 clicks**.

Government advocacy for manufacturing orders and long-term contracts, including Alstom.

Tourism – See RENEW, Strategic Action 5.

2. Create a new community safety and well-being plan including a neighbourhood strategy to build capacity and support improvements led at the neighbourhood level.

→ Ongoing

Phase 2 **Community Engagement Report finalized May 2021**. Close to **1,000 residents engaged** to inform Plan development.

Thunder Bay Community Safety & Well-Being **Plan approved June 2021**. **Six priorities were identified as well as six Action Tables**, which will develop new Implementation Plans or align with existing ones.

Community partners continue to work collaboratively to explore **development of a neighbourhood strategy.**

2021 Thunder Bay **Population Indicators Report finalized June 2021**. Report **includes 30 data indicators** that will be tracked and updated on a regular basis **to identify priorities and trends**.

3. Develop key City infrastructure that builds capacity such as a new multi-use indoor sports facility, the first phase of the Waterfront Trail and a long-term plan for the replacement of Fort William Gardens (FWG).

→ Ongoing

Expression of Interest issued and evaluated. Administrative update to City Council November 2021. **Funding application requesting $22.4M** submitted to Green and Inclusive Community Building for a Net-Zero building program.

Waterfront Trail: multi-use trail **completed on Island Drive floodway to Main St. (750m)**. **Wayfinding signage** for section north of Prince Arthur's Landing to Richardson's Terminal will be **installed** and **N. Water Street Lookout constructed in 2022**. Mission Island **portion of trail deferred until 2022** to investigate improved alignment. A 150m section of trail will be completed with Art Gallery construction.

Report on FWG completed October 2021 – Corporate Report No. 122/2021

4. Support construction and opening of a new Thunder Bay Art Gallery to further the ongoing development of a vibrant cultural scene on the waterfront, with a strong economic base.

→ Ongoing

Record of Site Condition **completed February 2021**

Completion of design work and construction documents for Sleeping Giant Parkway. Coordination of the Record of Site Condition requirements into the design and construction documents for the development of the public lands is **ongoing.**

Lease, funding and Municipal Capital Facilities **agreements 85-90% complete**.

60% project completion (City Portion). Further **advancement is contingent on Art Gallery progress**.

5. Work with the business community to develop and implement a zoning by-law and policies and procedures that facilitate business growth through increased ease of doing business.

→ Ongoing

Overview of **first draft of new Zoning By-law** presented to City Council **October 2021**. Public and Stakeholder **engagement will take place until year end**. **Final draft** presented for City Council approval **March 2022**. Currently at **75% completion.**

Strategic Core Area Community Improvement Plan (CIP) approved by City Council January 2021 and launched. **CIP is 100% complete**. To date, **14 properties** have received **CIP grants totaling $123,736**. See RENEW, Strategic Action 2.

RENEW - Focus on essential infrastructure, revitalize our cores and enhance our Image Routes.

1. Develop the asset management plan to reflect sustainability goals and make it available in plain language.

Ongoing

New Strategic Asset Management Policy **adopted July 2019**.

Phase 1 of Asset Management Plan for Core Assets (water, wastewater, storm water, roads, and bridges & culverts) will be **presented to City Council December 2021.**

Work has **commenced on Phase 2** – complete Asset Management Plan for all other assets (facilities, fleet, machinery & equipment, parks, sidewalks).

Phase 3, an approved **financing strategy** to fund the Asset Management Plan at a defined level of service, to be established by City Council and informed through **public consultation.** To be **completed July 2024**.

2. Revitalize the downtown cores in partnership with stakeholders, with a special focus on strategic investments such as addressing the future of Victoriaville and initiatives that further community safety and well-being.

Ongoing

Council resolved **Victoriaville Centre be demolished** and Victoria Avenue restored. **Project management has been awarded, project planning advanced, and the prime consulting and detailed design RFP issued** – intent to award January 2022.

Council approved appropriation of **$1.3M to advance the project** into the design and public consultation stage which will continue for 2022.

Downtown Fort William Revitalization Committee formed, first meeting November 2021.

Thunder Bay Police Service's **Project Prevent is being implemented** with community partners and **discussions ongoing about Safer Streets Strategy** and other models. Project Prevent and Safer Streets aim to **increase connections to supports** for individuals who are street-involved.

See GROW, Strategic Action 5.

3. Rehabilitate Boulevard Lake Dam to improve the City's response to severe rain events, reducing risk of flooding and damage to critical infrastructure; improve accessibility and active transportation facilities; and enhance cultural/heritage features of the dam to improve the quality of life of our citizens.

Achieved

Municipal Class Environmental Assessment completed and required permitting obtained, June 2020.

Project Design and Tender Project completed, June 2020.

Dam rehabilitation **completed**. Grand opening **November 2021.**

4. Focus our beautification efforts to make significant progress on implementing the Image Route Plan.

Ongoing

Waverley Park Lookout – **Planting of grasses and poppies completed** summer 2021. **Interpretive sign** delayed and estimated to be completed in **summer of 2022**.

Wayfinding Downtown Cores Phase – **Installation of wayfinding signage has begun**, fall 2021. To be **complete by spring 2022**.

North Core Streetscape pilot projects implemented during summer 2021, with one-way and two-way angled parking pilots and public space bump-outs continuing over winter 2021/2022. Consultation on pilots underway. Pilot projects on track for completion spring 2022. **Pilot Projects 60% complete**.

5. Promote, both inside and outside Thunder Bay, our many attractions, parks, facilities, services and innovative product development to encourage use.

Ongoing

Software, that integrates with existing City systems, **identified to showcase City parks and facilities online**. **Testing underway**. Implementation and public promotion to occur in **2022**.

2021 summer/fall tourism promotions resulted in **strong accommodation and attraction performance.** July 2021 **accommodation occupancies 83%** (national average 54.9%). Terry Fox Visitor Centre averaged **803 daily visitors**, a return to pre-pandemic levels. **Consumer awareness raised significantly** through Ontario and Manitoba targeted social media strategies and outreach to Canadian and US Midwest travel media. **Online searches increased 74%** over previous year and in Q3, **Thunder Bay was the 9th most googled Ontario travel destination** and the only Northern Ontario city. Pool 6 is scheduled for four cruise line vessels (2022-24). Anticipating **5,200 new affluent visitors** a year, **economic impacts of $3.1-$5.5 million** per annum and support between **50 and 88 FTE jobs.**

SERVE *(Program & Services Review)*

1. Create a Digital Strategy.

Ongoing

A proposed Digital Strategy, which includes a framework and roadmap for moving Information Technology and Digital Transformation initiatives forward, has been **developed in collaboration with stakeholders** and will be **presented to City Council November 2021**. The Strategy outlines a **phased approach to digitize core business processes** and make available **end-to-end digital services for citizens**.

2. Develop More Corporate Information Technology (CIT) Performance Metrics.

Ongoing

Design of CIT Intranet page is complete. Integration between the Intranet site and CIT's work management system is underway with various content, **including metrics**, being added to Intranet pages. In addition to content, **self-serve options** have also been incorporated in line with the principles of the proposed Corporate Strategy. This has resulted in a slight delay.

A **focus group** will provide feedback prior to launch. Following the required adjustments, the **CIT Intranet page will launch by year-end 2021.**

Project is 85% complete.

3. Review Specific Facilities for Possible Cost Reductions.

Ongoing

City Hall – second-generation energy audit recommendations **included in the 2022 - 2024 Capital Budget Forecast**.

Archives – The **digitization pilot project is underway** to determine cost benefit in an attempt to decrease paper records in the Corporate Records Centre (records that will be destroyed as per the Records and Retention By-law) **Implementation of TOMRMS* is 80% complete** across the corporation.
*The Ontario Municipal Records Management System

Victoriaville – See RENEW, Strategic Action 2.

Baggage Building Arts Centre – **Report on future operations model deferred to Q1 2022**. Facility **currently operated by City** for rentals and programming.

Pagoda Building – The Pagoda has remained **closed due to pandemic** restrictions, labour shortages, and the overpass construction adjacent to the building. **Plans underway to reopen** and **expand programming partnerships for seasonal special events** into late 2021 and resume **regular operating functions in 2022**.

4. Develop Strategy for Recreation Revenues.

Ongoing

First Report on User Fee Model presented to City Council September 2021. **Report back** to City Council anticipated **Q4 2021**, with approved user fee changes to be **implemented 2023**.

Advertising package for Arenas & Stadia released **Q3 2021**. **RFP for Digital Advertising** in Recreation Facilities in development, anticipated release **Q1 2022**.

SERVE *(PSR)*

5. Investigate Options to Increase Waste Diversion Rate.

Ongoing

October 2021, Council unanimously approved the **expansion of the municipal recycling program** to include #3 to #7 coded plastics **effective May 2022**.

Planning is underway for integration of the provincially mandated **food and organic waste program** into our existing solid waste system. Program to be **operational by the 2025** provincial deadline.

Work on transitioning the existing provincial waste diversion programs remains ongoing. A **new Blue Box Program Regulation was approved June 2021**, and a **new Hazardous Special Products Regulation October 2021.**

6. Improve Roads Communication and Consultation.

Ongoing

Roads is working with Corporate Communications to **determine public engagement opportunities** to better understand the public's specific concerns regarding Roads services.

Public engagement will be rolled out **Spring 2022**.

The **development and delivery of an enhanced communication plan**, informed by public engagement, will be created in **2022**.

7. Evaluate Sister Cities.

Ongoing

Project **leads identified** to develop performance metrics to evaluate relationships with current Sister Cities. A **matrix for review and evaluation** has been created and two meetings have been held to date with the Sister Cities Advisory Committee to review and work towards completion. Project at **60% completion.**

RENEW *(PSR)*

1. Renew Conservatory.

Ongoing

Report R 76/2021, regarding the **renewal of the Conservatory and recommended path forward,** was **presented June 2021** and supported by City Council, including securing **$1.4M in funding** from the Renew Thunder Bay Fund. The status of **external funding applications** are still pending.

A **tender** for the replacement of the Conservatory greenhouse structure is scheduled to go out **November 2021**.

SERVICE EXCELLENCE *(PSR)*

1. Create Human Resource Strategy.

Ongoing

Cost for a **consultant to support the development of a Human Resources Strategy** was included in the **2021 budget.** The scope of work in a Request for Proposal for a consultant has been deferred from Q4 2021 to Q1 2022.

Human Resources is working with a **consultant to complete a Recruitment Process Assessment**, and the report will be presented to City Council **December 2021**. This assessment **includes a review and recommendations for streamlining of the recruitment and selection process**, as well as a technology review, which ties into the Digital Strategy. **$60,000 in funding** was received from the Provincial Audit and Accountability Fund Intake #2 to support this work.

2. Continue Building out Corporate Safety.

Ongoing

The permanent **Safety Management System Coordinator position** was posted and **filled July 2021**.

Gap analysis on system Elements 005 (**Incident Investigation**) and 007 (**Health and Safety Communication**) are underway and are expected to meet the 2021 target for completion.

Internal auditors have been selected and **training will occur in Q3 2021** in preparation for auditing Elements 005 and 007 in 2022.

3. Review Supervisor Workload at Long Term Care.

Deferred

No immediate action taken due to COVID-19. Available resources will be **analyzed for action in 2022**.

4. Update and Formalize Fleet Practices.

Ongoing

Standardized **Reports of CVOR* compliance** have been created. Currently **implementing delivery of Reports** to relevant General Managers for review or action.
*Commercial Vehicle Operator's Registration

Continued **refinement and implementation of the Fleet Safety Management Plan**. Goal of achieving **CVOR performance rating of ≤35%** by end of 2022. Current CVOR rating (November 2021) **36%.**

Focus will be on **improved incident investigation, root causes, and corrective action in 2022.**

Review and update of Fleet Acquisition Procedures in progress, anticipated **completion Q1 2022.**

Reviewing ability of existing installed GPS technology to **determine appropriate methods and thresholds for vehicle idling reporting.**

Take Home Fleet Policy currently under review. Expected **completion Q2 2022.**

Data leveraged to understand fleet utilization and demand. Memo to Executive Management Team **October 2021.**

Roads and Fleet have been **working together to improve communication** and have equipment ready when needed. The enhanced communication has been successful to date. **Vehicle servicing agreements will be reviewed** as they expire to ensure the best alignment for the needs of both Fleet and Roads.

SERVICE EXCELLENCE *(PSR)*

5. Modernize Phone Systems to Facilitate Operational Improvements, Efficiencies and Potential Costs Savings.

→ Ongoing

Work continues with **reviewing existing services, design of the new services and implementation of the modernized phone system** for City locations (where applicable).

Additional sites have been identified bringing the **total number of sites in scope to 74**.

Work has been **completed for 35 City sites**, **five additional sites are in progress** and expected to be completed by end of 2021, with remaining sites scheduled for 2022 (year two of the two-year project).

6. Optimize Office Space.

→ Ongoing

Draft project charter developed and being circulated to internal subject matter experts prior to being presented to City Manager/Executive Management Team for **review early 2022**.

Strategic Initiatives & Engagement

Corporate Communications | Strategic Initiatives |
Indigenous Relations
500 Donald Street East
Thunder Bay, ON P7E 5V3
(807) 625-3859

MEMORANDUM

TO: Krista Power, City Clerk

FROM: Tracie Smith, Director - Strategic Initiatives & Engagement

DATE: November 16, 2021

RE: Report R 166/2021 (City Manager's Office – Strategic Initiatives & Engagement)
City of Thunder Bay 2019-2022 Corporate Strategic Plan – Revised Implementation
Plan and Third Progress Update
Committee of the Whole – December 20, 2021

I would like to request the opportunity to provide a presentation relative to Report R 166/2021 (City Manager's Office – Strategic Initiatives & Engagement) to provide an update and information relating to the City of Thunder Bay 2019-2022 Corporate Strategic Plan – Revised Implementation Plan at the December 20, 2021 Committee of the Whole meeting.

City Manager Norm Gale will provide introductory remarks and introduce the presenters, Tracie Smith, Director - Strategic Initiatives & Engagement and Jodi Wright, Communications Specialist – Corporate Communications.

Cc: Norm Gale, City Manager

Corporate Report

DEPARTMENT/ DIVISION	City Manager's Office - Human Resources & Corporate Safety	*REPORT*	R 176/2021
DATE PREPARED	11/22/2021	*FILE*	
MEETING DATE	12/20/2021 (mm/dd/yyyy)		
SUBJECT	2021 Corporate Safety Mid-year Summary Report		

RECOMMENDATION

For information only.

EXECUTIVE SUMMARY

This report summarizes Corporate Safety section activities for the period of January – September 2021. As proposed in the Memo to Council dated February 11, 2020, this report is intended to provide an update of basic statistics with follow-up analysis and interpretation to be provided in the full year report to be presented in Q2 2022.
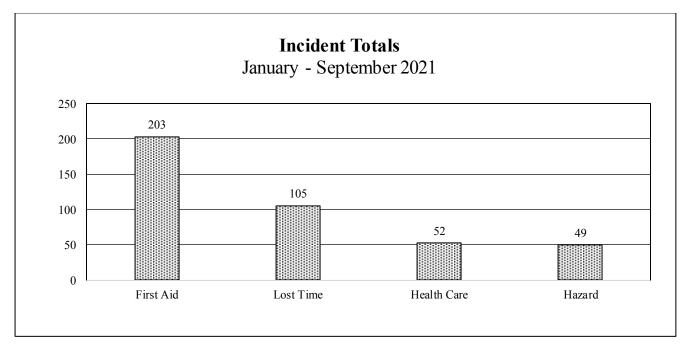
DISCUSSION

Work completed January – September 2021

- Continued COVID-19 support and response
- Developed four new COVID procedures along with 40 revisions to previously developed COVID temporary procedures
- Validation of personal protective equipment (PPE) supplies and establishment of future pandemic supply through COVID-19 PPE Task Force
- Implemented information collection software to capture vaccine disclosure information and rapid antigen testing results
- Recruited and trained new Safety Management System Coordinator and Corporate Safety Specialist
- Intelex Software implementation to support the Safety Management System (SMS)
- Conducted Gap Analysis of SMS Elements 005 (Incident Investigation) and 007 (Health and Safety Communication) at 32 locations
- Transportation of Dangerous Goods Audit by Transport Canada and follow up actions to develop program for spent aerosol containers

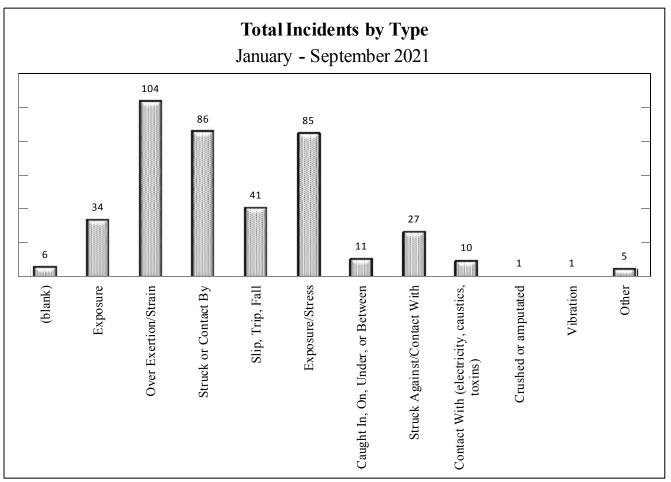- Silica testing conducted for road sweeping operations

Graphs 1 to 4 below provide preliminary statistics of reported incidents of injury or potential injury to City staff from January to September 2021. A full report including trends and analysis of the data along prevention activities will be reported in the full year summary provided to Council in Q2 2022 as approved by Council in February 2020.
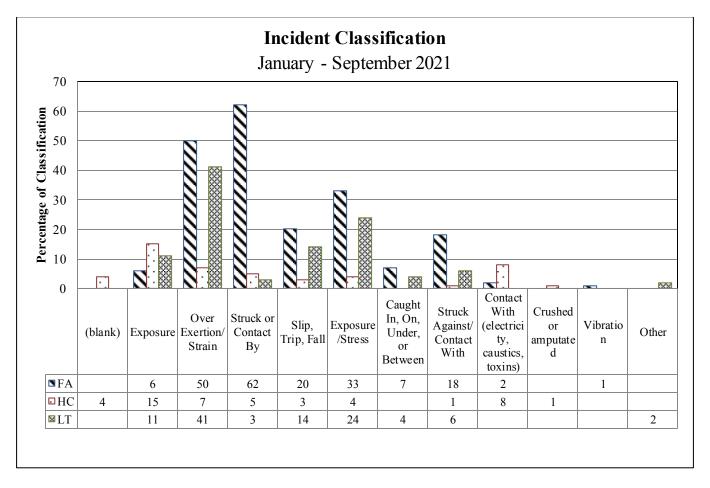
Graph 1

Incident Totals
January - September 2021

YTD Total of Reported Incidents = 402

Graph 2

Total Incidents by Type

January - September 2021

Chart data:
- (blank): 6
- Exposure: 34
- Over Exertion/Strain: 104
- Struck or Contact By: 86
- Slip, Trip, Fall: 41
- Exposure/Stress: 85
- Caught In, On, Under, or Between: 11
- Struck Against/Contact With: 27
- Contact With (electricity, caustics, toxins): 10
- Crushed or amputated: 1
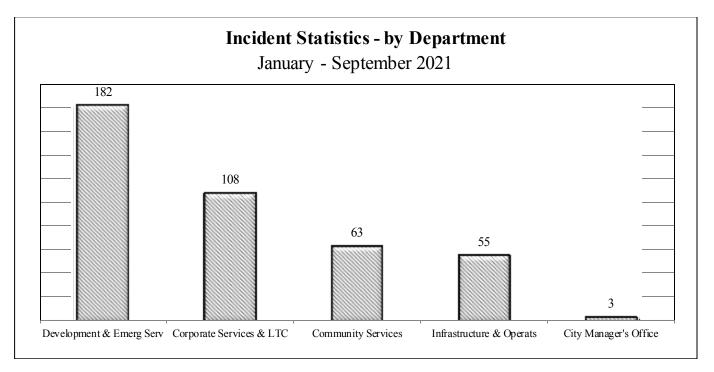- Vibration: 1
- Other: 5

* The blank column represents incidents where a Supervisor has not associated what type of injury occurred. This maybe the result of a reoccurrence of a previous workplace injury, medical follow up to a previous workplace injury or if the Supervisor suspects that the injury is not work related.

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Graph 3

Incident Classification
January - September 2021

	(blank)	Exposure	Over Exertion/ Strain	Struck or Contact By	Slip, Trip, Fall	Exposure /Stress	Caught In, On, Under, or Between	Struck Against/ Contact With	Contact With (electricity, caustics, toxins)	Crushed or amputated	Vibration	Other
FA		6	50	62	20	33	7	18	2		1	
HC	4	15	7	5	3	4		1	8	1		
LT		11	41	3	14	24	4	6				2

* The blank column represents incidents where a Supervisor has not associated what type of injury occurred. This maybe the result of a reoccurrence of a previous workplace injury, medical follow up to a previous workplace injury or if the Supervisor suspects that the injury is not work related.

Graph 4

Incident Statistics - by Department

January - September 2021

Department	Value
Development & Emerg Serv	182
Corporate Services & LTC	108
Community Services	63
Infrastructure & Operats	55
City Manager's Office	3

FINANCIAL IMPLICATION

There are no financial implications.

CONCLUSION

It is concluded that the information in this report appropriately describes the events and activities associated with the Corporate Safety Section.

BACKGROUND

Corporate Safety Section provides two reports annually to Council. The first report outlines the status of the safety program and makes recommendations for the ensuing year. The second report is a year to date brief of safety statistics and notable items.

REFERENCE MATERIAL ATTACHED:

None.

PREPARED BY: KERRI BERNARDI, MANAGER, CORPORATE SAFETY

THIS REPORT SIGNED AND VERIFIED BY: (NAME OF GENERAL MANAGER)	DATE:
Norm Gale, City Manager	November 29, 2021

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Corporate Report

DEPARTMENT/ DIVISION	City Manager's Office - Human Resources & Corporate Safety	REPORT NO.	R 182/2021
DATE PREPARED	11/27/2021	FILE NO.	
MEETING DATE	12/20/2021		
SUBJECT	Recruitment Process Improvement Project		

RECOMMENDATION

For information only.

LINK TO STRATEGIC PLAN

The City of Thunder Bay's "One City, Growing Together" 2019 – 2022 Strategic Plan details a vision of the City that will act to Lead, Serve, Grow and Renew. The Recruitment Process Improvement Project supports these goals particularly as it relates to advancing Service Excellence.

Strategic Pillar: Serve – Advance service excellence through a citizen focus and best use of technology.

The Recruitment Process Improvement Project identifies recommendations to maximize and streamline the technology solutions utilized in the recruitment, hiring, and selection process.

EXECUTIVE SUMMARY

This report outlines the findings and recommendations of the Recruitment Process Improvement Project report as outlined in Attachment A.

The completion of an in-depth assessment of the recruitment process to determine opportunities to streamline the recruitment process was a recommendation of the Grant Thornton Program and Service Review Phase 2 Final Report completed in 2020.

DISCUSSION

In today's tight labour market there is greater competition for talent, skill shortages are increasingly evident and candidates are more selective when applying for jobs. There is a

growing labour shortage in Canada, and like many employers, the Corporation is facing increasing challenges recruiting and retaining employees in a number of sectors.

A competitive and streamlined recruitment, selection and hiring process that communicates the City of Thunder Bay as an employer of choice, along with key workforce planning strategies and sourcing tactics to find talent are critical in order to meet the hiring needs of the Corporation.

An in-depth review of the City's recruitment, selection and hiring process was undertaken with the priority of identifying process efficiency opportunities that:

- maximize and streamline technology solutions;
- advance workforce diversity and inclusivity;
- improve customer service to hiring supervisors;
- provide a quality candidate experience; and
- enhance the overall quality of hiring outcomes.

Approach & Engagement

The consulting firm J. Macpherson & Associates was hired through a Request for Proposal process to facilitate the review of the City's recruitment, selection and hiring processes.

Extensive stakeholder consultation was taken to best understand the current processes and user experience. In addition to interviews with internal and external stakeholders, over 70 internal hiring supervisors provided feedback through an online survey. In-depth surveys were completed with benchmark municipalities, as well as a review of leading recruitment best practices.

Stakeholder consultation and information about external best practices, together with a review of the current recruitment processes, documentation and supporting technology, informed the recommendations.

Key Recommendations

The recommendations identify process efficiencies focused on improving the candidate experience, decreasing the time that hiring supervisors spend in the selection process and ultimately reducing the amount of time it takes to fill a vacancy.

Highlights of the recommendations are summarized below.

Candidate Experience and Talent Attraction

Modernizing and streamlining the candidate's interaction and experience with the City's recruitment process will promote City job opportunities, attract qualified applicants, and improve the candidate's application experience and first impression of the City as an employer of choice. Recommendations focused on candidate experience include:

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- Simplify and redesign the job posting.
- Streamline online application process for candidates.
- Continue to expand social media marketing and sourcing.
- Investigate the capability of a Job Alert process.
- Modernize the City of Thunder Bay Job Website.
- Establish clear expectations of candidates.

Optimal Technology Recruitment Solution

Modernization of the recruitment process will require the City to transition to a comprehensive technology solution, fully integrated with SAP that will support an end-to-end recruitment, selection, hiring and onboarding process.

Interim Technology Solutions

Prior to implementation of an optimal technology solution in the longer term, the following interim technology solutions are recommended and will result in short term efficiencies and benefits for all stakeholders:

- Reconfigure iCIMS, the Corporation's current applicant tracking system, to expand use of screening questions.
- Enable hiring supervisors to gain earlier access to applications.
- Automate the linking of seniority to candidate listing.
- Utilize digital tools to schedule interviews with external applicants.
- Creating an iCIMS Super user role within the division.

Process and Procedure Related

The following recommendations focus on the streamlining of recruitment processes:

- Establish Recruitment Service Standards.
- Develop Interview Question Repository as a tool for hiring supervisors.
- Reduce probation reports from three to one.
- Revise nepotism procedure to eliminate name recognition process.
- Explore efficiencies in the reference check process.
- Continue to leverage technology through virtual interviews and orientation.

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Resourcing

An increase in staff resources is recommended to support current recruitment workload, provide additional support for hiring supervisors through the development of recruitment and retention strategies, as well as supporting the implementation of process improvements is recommended and required in order to support the above key recommendations. Recommendations include the addition of the following positions in a phased approach over the next two years:

- Temporary Human Resources Assistant
- Recruitment Consultant
- Diversity, Equity and Inclusion Consultant

FINANCIAL IMPLICATION

There are no immediate financial implications associated with the Recruitment Process Improvement Project. The City obtained provincial funding for completion of the project through the Audit and Accountability Fund – Intake #2.

Costs associated with implementation of recommendations will be identified and requested through the annual budget process for Council consideration.

CONCLUSION

It is concluded that the information in this report appropriately describes the findings and recommendations of the Recruitment Process Improvement Project report as outlined in Attachment A.

BACKGROUND

On June 22, 2020, Committee of the Whole received Corporate Report No. R 79/2020 providing the Grant Thornton Phase Two Report. At that meeting, Committee passed a motion that directed administration to provide a report that offers an assessment of the recommendations that provides information on the financial impacts, associated timelines, the greatest value to residents, and information about potential implementation opportunities in the following areas:

- Information Technology modernization
- Human Resources & Corporate Safety
- Enhanced customer service initiatives
- Operational efficiencies
- Community partnerships
- Facilities rationalization
- Minimizing competition with existing private sector and non-profit organizations
- Service level reductions/enhancements

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• Enhanced revenue generating opportunities
• Cost recovery policies for municipal programs, services and facilities

The Program and Service Review identified a number of recommendations related to the Human Resources recruitment process:

"19. Increase Human Resource department involvement in the recruitment process to redirect frontline supervisor time to service delivery e.g., HR should screen candidates and provide supervisors a shortlist of candidates for interviews."

"20. Consider integrating HR databases as there are several platforms where data is shared and stored that hold information about different parts of the recruitment process e.g., There are three systems that are separate: iCIMS, Request to Hire is an internal system from CIT and TB 40 internal database."

"21. Leverage technology especially during the selection process such as using online screening filters, video interviews, etc."

"42. Conduct a deep-dive assessment of the recruitment process to determine opportunities for processes to be eliminated or consolidated to make recruitment more streamlined."

The completion of an assessment of the recruitment process was recommended by administration in Corporate Report 144/2020 (City of Thunder Bay Program and Service Review – Implementation) presented at a special Committee of the Whole meeting on December 9, 2020 and approved by Committee.

In March 2021, a Request for Proposal was issued for consulting services related to the recruitment process assessment (RFP 2021-16). Professional consulting firm J. Macpherson & Associates was selected through the RFP process. The consulting work completed by J. Macpherson & Associates is being funding through Administration's successful application to the Audit and Accountability Fund – Intake #2.

REFERENCE MATERIAL ATTACHED:

ATTACHMENT A - RECRUITMENT PROCESS IMPROVEMENT PROJECT REPORT

PREPARED BY: KARIE ORTGIESE, DIRECTOR – HUMAN RESOURCES & CORPORATE SAFETY

THIS REPORT SIGNED AND VERIFIED BY: (NAME OF GENERAL MANAGER)	DATE:
Norm Gale, City Manager	December 10, 2021

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City of Thunder Bay
Recruitment Process Improvement Project
Final Report

J. Macpherson & Associates
November 2021

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Executive Summary

In 2019, City of Thunder Bay retained Grant Thornton LLP to perform a high-level Municipal Program and Service Review. One of their recommendations was to conduct a deep dive assessment of the recruitment process to identify process efficiency opportunities. The City was successful in seeking provincial support and funding for the Recruitment Process Improvement Review project through the Audit and Accountability Fund. J Macpherson & Associates was selected to lead this review.

The goal of the project was to identify opportunities to modernize the recruitment process for the City of Thunder Bay and find efficiencies that:

- maximize and streamline technology solutions;
- advance workforce diversity and inclusivity;
- improve customer service to hiring supervisors;
- provide a quality candidate experience; and
- enhance the overall quality of hiring outcomes.

An in-depth current state assessment was undertaken which included a comprehensive stakeholder engagement to gain an understanding of key stakeholder perspectives and insights. A total of 49 stakeholder interviews were conducted. These included interviews with hiring supervisors, Human Resource staff, various subject matter experts and union executives. In addition, over 70 hiring supervisors completed an online survey. A survey of 11 benchmark municipalities and a recruitment best practice review was conducted to gain an external perspective and identify potential improvement opportunities. The findings from the internal and external scan are outlined in Section Two: Current State Findings.

An overview of current and future challenges facing organizations is provided in Section Three: Labour Market Challenges. The challenges highlight the importance of having a competitive recruitment process as well as an overall Human Resource strategy that addresses retention, workforce planning and building internal capacity through employee development. Work on developing a comprehensive HR Strategic Plan for the City of Thunder Bay is scheduled to commence in 2022 and will position the organization well to meet future labour market challenges.

Modernization of the recruitment process requires the organization to transition from the current applicant tracking focused system to a system that supports end-to-end recruitment, selection, hiring and employee onboarding processes. Accordingly, it is recommended that the City utilize the process set out in the Corporate Digital Strategy to implement a comprehensive end-to-end technology solution that is fully integrated with SAP.

Recommendation: Implement an Optimal Technology Solution.
A new end-to-end solution that fully integrates with SAP would automate workflow for improved efficiency, eliminate stand alone databases, provide advanced HR analytics and reporting and align with the direction set out in the Corporate Digital Strategy.

The implementation of a more robust technology solution is a long term solution and must be effectively sequenced as part of a comprehensive HR process management system incorporated in an approved SAP roadmap.

Transitional Recommendations:
The review also identified a number of recommendations for implementation during the transition period that would be beneficial for candidates, hiring supervisors and recruitment staff.

The majority of transitional recommendations could be implemented within a twelve month period and are categorized into the following four improvement categories:

- Candidate Experience & Talent Attraction
- Interim Technology Solutions
- Process and Procedure Improvements
- Resourcing

Appendix 4 provides a listing of all recommendations and proposed timing. Additional details are provided in Section Four: Recommendations.

Addressing the resourcing and priority recommendations identified in Appendix 4 is a critical success enabler in order to have the resource capacity necessary to implement the remaining recommendations. The recommendation supporting the addition of a new Recruitment Consultant for 2022 is consistent with the Grant Thornton LLP report finding.

This report and the recommendations identified in Appendix 4 provide a roadmap for modernizing and transforming the recruitment process at the City of Thunder Bay. They identify immediate opportunities for improvement, as well as an optimal solution as part of the future SAP Roadmap.

Section One: Project Background and Approach

In 2019, Grant Thornton LLP was engaged to carry out a Municipal Program and Service Review (PSR) for the City of Thunder Bay. As part of the PSR, Grant Thornton LLP conducted a high level review of the City of Thunder Bay recruitment process. The review identified several recommendations and one overarching recommendation.

Recommendation # 42 - Conduct a deep-dive assessment of the recruitment process to determine opportunities for processes to be eliminated or consolidated to make the recruitment process more streamlined.

Source: Grant Thornton LLP - Municipal Program and Service Review

City Administration recommended moving forward with the recruitment process improvement review and the recommendation was supported by City Council. The City of Thunder Bay applied for funding from the Ontario government under the Audit and Accountability Fund Program that was established to help municipalities improve local services delivery and ensure taxpayers' dollars are being used efficiently. The City's request for funding for the study was approved.

A Request for Proposal was issued in March 2021 to hire an external consultant to lead a collaborative review of the recruitment, selection, and hiring process. J. Macpherson & Associates was contracted to lead the review. The goal of the project was to:

- maximize and streamline technology solutions;
- advance workforce diversity and inclusivity;
- improve customer service to hiring supervisors;
- provide a quality candidate experience; and
- enhance the overall quality of hiring outcomes.

To better understand the current process and user experience, an extensive stakeholder engagement was undertaken. This involved individual and group interviews with Human Resource staff, hiring supervisors, and union leaders. All hiring supervisors were invited to complete a survey to provide feedback on the current hiring process. A list of all consulted stakeholders is outlined in Appendix 1.

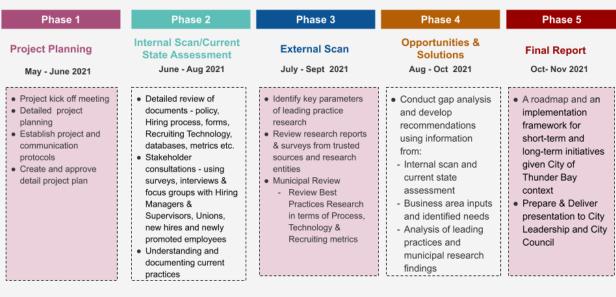The team also carried out an external scan of 11 benchmark municipalities and reviewed leading practices. A list of benchmark municipalities is outlined in Appendix 1.

Given technology plays a critical role in creating time and cost efficiencies, the project team made sure to connect with the Corporate Information Technology team and their consultants working on the Corporate Digital Strategy. The project team wanted to

ensure recommended improvements were aligned with the new Corporate Digital Strategy.

The project was divided into the five phases outlined below.
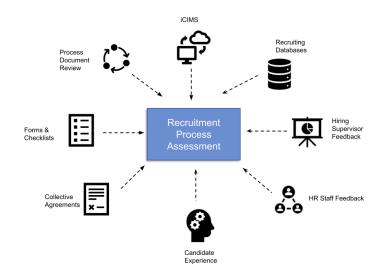
Recruitment Process Improvement Project

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Project Planning	**Internal Scan/Current State Assessment**	**External Scan**	**Opportunities & Solutions**	**Final Report**
May - June 2021	June - Aug 2021	July - Sept 2021	Aug - Oct 2021	Oct- Nov 2021
• Project kick off meeting • Detailed project planning • Establish project and communication protocols • Create and approve detail project plan	• Detailed review of documents - policy, Hiring process, forms, Recruiting Technology, databases, metrics etc. • Stakeholder consultations - using surveys, interviews & focus groups with Hiring Managers & Supervisors, Unions, new hires and newly promoted employees • Understanding and documenting current practices	• Identify key parameters of leading practice research • Review research reports & surveys from trusted sources and research entities • Municipal Review - Review Best Practices Research in terms of Process, Technology & Recruiting metrics	• Conduct gap analysis and develop recommendations using information from: - Internal scan and current state assessment - Business area inputs and identified needs - Analysis of leading practices and municipal research findings	• A roadmap and an implementation framework for short-term and long-term initiatives given City of Thunder Bay context • Prepare & Deliver presentation to City Leadership and City Council

© J Macpherson & Associates

Understanding an organization's culture, systems, processes, related strategies and history is critical in assessing the current state of the recruitment, selection and hiring process. Understanding the external environment allows for the identification of potential solutions and improvement opportunities and the building of sustainable solutions. The information below is based on the findings from:
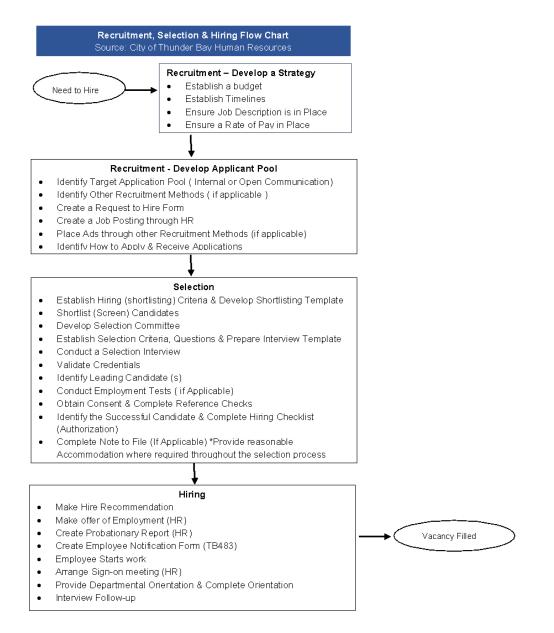
- a key document and process review;
- stakeholder engagement and input;
- a review of current supporting technology including the iCIMS System (Applicant Tracking system), and Jobs Website;
- a review of the Corporate Digital Strategy;
- a municipal benchmark survey; and
- best practice research.

2.1 City of Thunder Bay Recruitment Context

The City of Thunder Bay operates a number of diverse business lines in a very competitive labour market. Recruitment practices are governed by legislation, collective agreement terms, and City policies and procedures.

The current process has three stages commonly referred to as recruitment, selection and hiring. The three stages are further broken down into essential steps that drive the associated flow of work and are supported by forms and manuals. An overview of the current recruitment, selection and hiring process flow is outlined below.

Recruitment, Selection & Hiring Flow Chart
Source: City of Thunder Bay Human Resources

Need to Hire →

Recruitment – Develop a Strategy
- Establish a budget
- Establish Timelines
- Ensure Job Description is in Place
- Ensure a Rate of Pay in Place

↓

Recruitment - Develop Applicant Pool
- Identify Target Application Pool (Internal or Open Communication)
- Identify Other Recruitment Methods (if applicable)
- Create a Request to Hire Form
- Create a Job Posting through HR
- Place Ads through other Recruitment Methods (if applicable)
- Identify How to Apply & Receive Applications

↓

Selection
- Establish Hiring (shortlisting) Criteria & Develop Shortlisting Template
- Shortlist (Screen) Candidates
- Develop Selection Committee
- Establish Selection Criteria, Questions & Prepare Interview Template
- Conduct a Selection Interview
- Validate Credentials
- Identify Leading Candidate (s)
- Conduct Employment Tests (if Applicable)
- Obtain Consent & Complete Reference Checks
- Identify the Successful Candidate & Complete Hiring Checklist (Authorization)
- Complete Note to File (If Applicable) *Provide reasonable Accommodation where required throughout the selection process

↓

Hiring
- Make Hire Recommendation
- Make offer of Employment (HR)
- Create Probationary Report (HR)
- Create Employee Notification Form (TB483)
- Employee Starts work
- Arrange Sign-on meeting (HR)
- Provide Departmental Orientation & Complete Orientation
- Interview Follow-up

→ Vacancy Filled

A review of recruitment and selection support documentation and forms found that the process was well documented. The Recruitment, Selection and Hiring Manual for hiring supervisors was recently updated in April 2020 and provides a comprehensive guide to the hiring process. The manual is supplemented by a Hiring Criteria Shortlisting Guide, Interviewing Guide, and Reference Checking Guide. The recruitment team also developed a Virtual Interviewing Guide in response to the challenges of the COVID-19 Pandemic.

The checklists and tools provided in these resources are designed to support the hiring supervisor in each step of the recruitment, selection and hiring process. The tools are available on the intranet and are generally well organized and easy to find. Corporate policy and procedures are written in a clear and concise manner but would benefit from

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a review and update. New hiring supervisors receive training sessions to familiarize them with the City's hiring process (Hiring the Best Training Program) as part of the New Supervisor Orientation Program. Presently the training is being delivered virtually in response to the COVID-19 Pandemic.

There is an opportunity to build on past efforts to provide hiring supervisors an inventory of possible interview questions. This was raised by some hiring supervisors and has merit in supporting a decentralized selection process.

Stakeholders also observed that the majority of forms are not completed within or integrated in the current applicant tracking system. This means most of the work associated with the selection stage of the process is done outside of the system.

Hiring supervisors play the main role in the hiring process and are responsible for the completion of the majority of the tasks associated with the process. This includes initiating the hiring request, selecting where to advertise, screening candidates, shortlisting candidates, establishing interview questions and tests (if applicable), organizing hiring panels and interviews with candidates, reference checking, selecting the preferred candidate, and completing all associated documentation. Most hiring supervisors indicated there was no decentralized administrative support available to assist them.

In general, HR Assistants provide support when preparing and posting job openings, forwarding applications to the hiring supervisor, reviewing key documentation, making the conditional job offer, ensuring pre-employment conditions are met by the candidate, and finalizing the job offer. They are available to provide advice to hiring supervisors throughout the process. The HR Assistants assigned to support the recruitment process also provide non-recruitment support to the organization. This can make it difficult to meet tight timelines or last minute changes.

The volume of job postings in 2019 was 541, an increase of 16.8% from 463 postings in 2017. The number of applications has also risen from just over 10,000 in 2017 to over 15,000 in 2019, an increase of 50%. External applications make up approximately 80% of all applications received.

The benchmark survey found that six of the 11 municipalities surveyed are staffed with specialist recruiters and the remaining five utilize a hybrid or generalist model to provide recruitment support to the hiring supervisors. The vast majority of organizations indicated that HR assists with screening of applications, the coordination of interviews and participates in interviews for both full-time and part-time positions. The number of competitions handled by a dedicated recruiter ranged from 60 to 90 annually.

In general, City of Thunder Bay hiring supervisors are responsible for completion of the majority of the tasks associated with the selection stage of the process. Implementing a specialist recruiter model would be a significant organizational change and is not recommended because:

- hiring supervisors currently carry out the recruitment related tasks in a competent manner;
- hiring supervisors did not identify the need to have recruiters to participate in interviews;
- a number of the challenges identified by hiring supervisors will be addressed by the recommended improvements to the process; and
- implementing an end-to-end recruitment system and developing targeted sourcing strategies for hard-to-fill positions is a better investment than hiring three or four recruiters.

2.2 Time To Fill

As part of the Stage 2 Municipal Program and Service Review, Grant Thornton LLP reviewed cycle time for the Corporation's recruitment, selection and hiring process.

The review focused on the time to fill a position and highlighted the time associated with various steps in the process. Based on their analysis of sample 2019 data the average cycle time for union jobs was 66.86 days (9.55 weeks) and for non-union jobs was 83.82 days (11.97 weeks).

The following reasons were cited by Grant Thornton LLP for the longer timeframes associated with steps in the process.

Job Postings Requirements

- The competition was posted for a long time frame in order to reach targeted applicants and yield a qualified pool of applicants. This was typically done for competitive and/or senior level positions.
- A nepotism approval was required from Council.
- Job description changes were still being finalized with the department.
Collective agreements stipulated posting locations, such as on a paystub.

Conditional Offer Delays
- Delays may be the result of waiting for a police record check, work fitness test, a name recognition check, completion of operator in training exam, and/or a delay in candidates bringing in required conditional documentation.
- Initial candidate declined the position and the position had to be offered one or more times.

- A wage rate is being negotiated (non-union) or a Supervisor seeks a wage beyond the start rate of the collective agreement, which requires a consultation.
- Vacation negotiation (non-union) outside of City By-law, which requires review and approvals.

Source: Grant Thornton LLP - Municipal Program and Service Review

The Recruitment Team doesn't currently have the technological capability to produce recruitment performance reporting or analytics. All data requires significant time and manual effort to extract and analyze. Given this constraint, the data that was manually compiled for the Grant Thornton LLP report was also utilized for this project.

The municipal benchmark survey found that organizations measure time-to-fill based on the period between the posting of the vacancy and job acceptance. This does not include the period of time from acceptance to start date that was included in the Grant Thornton LLP numbers. The average time-to-fill for benchmark municipalities was approximately 58 days for union and non-union combined. This is similar to a Conference Board of Canada survey average of about 56 days. It is important to note that time-to-fill for unionized positions is typically less than for non-union positions. Accordingly, the time-to-fill for union positions in benchmark organizations is likely less than the overall average reported.

Once the City of Thunder Bay data was adjusted to match the same parameters as the benchmark municipalities, the time to fill became 56.6 days for union positions and 70.18 days for non-union positions. It is reasonable to conclude that the City's average time-to-fill for all postings is above the benchmark group average.

2.3 Stakeholder Engagement and Input

An in-depth current state assessment was undertaken to gain an understanding of key stakeholder perspectives and insights. A total of 49 stakeholder interviews were conducted. These included interviews with hiring supervisors, recruitment staff, various subject matter experts and union executives. In addition, over 70 hiring supervisors completed an online survey.

2.3.1 Hiring Supervisor

Hiring supervisors play a primary role throughout the recruitment, selection and hiring process. Understanding their perspective and experience was critical to identifying improvement opportunities. Input was gathered through personal and group interviews as well as through an online survey.

Several themes emerged from the review reaffirming that the City of Thunder Bay has a strong foundation to modernize the overall process from start to finish. It is not unusual when conducting process improvement reviews to find that items identified as strengths may also be identified as challenges.

Strengths:
- The 2017 implementation of the iCIMS system that transitioned from paper application submissions to an electronic process. The faster turnaround time to receive applications was noted by many as being a significant improvement.
- Recruitment staff support and professionalism is greatly appreciated with participants sharing numerous examples of support they received that improved the hiring outcome.
- Request to Hire Form and the built in workflow is seen as helpful.
- Supervisors have been able to address some area specific concerns through flexible changes with Recruitment. They cited having an open posting and the ability to post off-cycle as a positive.
- The ability to test candidates' qualifications is a strength and valued by hiring supervisors, particularly in the unionized environment.
- There has been expanded sourcing through social media channels like Facebook posts.
- Several staff noted improvements in turnaround time for police checks.

A number of challenges and concerns were also raised. This included the issue highlighted in the Grant Thornton LLP review, that the process to hire a new staff member takes too long. The number one concern expressed by hiring supervisors was the time it took them to screen a competition file.

Challenges:
- Screening applicants is time consuming and frustrating. While the move to accepting online applications was overall seen as an improvement, it was also identified as the major reason for receiving a larger number of applications from the public that required review.
- Delays in posting positions in a timely manner result in delays in hiring. Many acknowledged this as a collective agreement requirement. Others believe greater flexibility where the collective agreement does not restrict posting timelines would be beneficial particularly for CUPE temporary employees.
- Losing candidates because of the time it takes to complete the steps in the hiring process. Several mentioned losing qualified candidates because the process took too long and noted that other employers seemed to be able to move quicker. The time it takes to offer the position to a candidate was mentioned by several individuals.

- iCIMS was mentioned as a first step to use technology as part of the recruitment process, but as an incomplete solution for several reasons:
  - Most tasks assigned to a hiring supervisor are performed outside of the system using other forms and tools. This is administratively time consuming and takes them away from their major operational responsibilities.
  - Given system limitations, the work involved in shortlisting and selecting involves duplicate data entry.
  - Hiring supervisors are unable to view applicants as they apply. Accessing applications throughout the process would allow for the hiring supervisor to manage the volume and workload of screening.
- Hard-to-fill positions. Several identified the need for additional help in developing sourcing strategies to find candidates for hard-to-fill positions. Some mentioned having to repost three times. There were supervisors from a few areas who mentioned how they appreciated the support provided by Human Resources to create hiring pools.
- Reference checking is seen as time consuming and some wondered about the value added it provided to the process.
- During peak recruitment time (summer hiring) hiring should be the priority.
- Communication challenges related to the status of an offer made it difficult for supervisors to plan for future work schedules.

Hiring supervisors also shared a number of potential improvement ideas. The ideas shared were reviewed and considered in the development of the recommendations included in Section Four of this report. Given the diversity of the different business areas that the City operates, ideas that may be applicable for one area may not be appropriate for another. Some proposed ideas were to:

- Screen applicants for basic qualifications prior to the hiring supervisor review. While most indicated they felt Recruitment should do this manual task, others felt that an automated system should be able to achieve similar results. Many acknowledged the implications on resourcing if Recruitment were to perform this task.
- Explore a single integrated recruitment, selection and hiring technology solution that enables hiring supervisors to complete all steps within the product and have minimal work done outside the solution. Others suggested all required documents be made available through iCIMS. This would minimize the administrative tasks of a hiring supervisor through integrated smart forms.
- Allow the hiring supervisor to contact the successful candidate and make the conditional job offer. Many questioned the reason for this handoff given they have been responsible for the entire process up to that point.

- Consider implementing a conditional hire process allowing applicants to start work and provide a defined period of time in which they must satisfy the conditions of employment.
- Start the recruitment process for rehires and new seasonal staff and students earlier. Align with or be in front of other employer recruitment campaigns.
- Create a searchable bank of interview questions that all hiring supervisors could access.
- Maintain the nepotism requirements and drop the name recognition requirement.
- Review the necessity of reference checking and consider alternative approaches, such as online reference checking.
- Consider onsite recruitment support for operations where a demonstrated need can be established.

Best practice research and the municipal benchmark survey identified some similar potential improvement opportunities with respect to the automated screening of applicants for basic qualifications, alternatives for reference checking, and focusing solely on nepotism requirements.

2.3.2 The Recruitment Team

Members of the Recruitment Team were interviewed to gain an understanding of the current process and responsibilities from their perspective. They play a critical role in supporting the process and have the unique role of process and decision oversight. An important consideration was following approved processes to ensure fairness and minimize the risk associated with errors in hiring.

Strengths:
- The introduction of iCIMS has improved the front end of the recruitment process and eliminated some of the administrative tasks associated with consolidating and sorting applications.
- Recruitment staff take pride in their jobs and provide good service and care about the organization. Many hiring supervisors indicated they felt HR staff were professional and helpful.
- Where possible, recruitment staff have demonstrated flexibility by trying to accommodate late posting requests and off-cycle posting requests.
- There are few recruitment grievances or disputes and hiring decisions are defensible.

Challenges:
- Recruitment staff are struggling to keep up with the volume of work given the current requirements, responsibilities, and lack of a fully integrated technology solution.
- The current process is set up for batch recruitment with specific timelines for job

postings due to collective agreement requirements. However, hiring supervisors often presented requests to post at the last minute, resulting in other work being delayed.

- Staff turnover in the recruiting area can impact the ability to complete tasks because the amount of time to train new staff is significant given the multiple databases, spreadsheets and processes that are not integrated.
- Significant time is spent following up with candidates to complete the requirements of the conditional offer.
- Recruitment staff spend a great deal of time addressing the issues that arise when the hiring process is not followed.
- The current process for creating a posting is time consuming.
- Staff do not have the time to help hiring supervisors who are having difficulty finding qualified staff. On occasion, the same position must be posted multiple times before an individual is hired.

Similar to the hiring supervisors, the recruitment staff also identified a number of potential improvement ideas. Given their heavy administrative workloads, the improvement ideas focused on improved technology that would be fully integrated and eliminate maintenance of multiple databases. Notwithstanding the desire for an optimal solution as part of the SAP Roadmap development, it is important to identify immediate actions that would reduce some of the administrative work and that additional support be added to assist as solutions are being implemented.

2.4 Technology

Technology plays a critical role in improving service and process efficiency. A well-configured technology solution that addresses business needs can significantly reduce effort for applicants, hiring supervisors and recruiting staff. Technology modeled from a customer perspective can enhance the overall candidate experience and impression of the organization.

2.4.1 Corporate Digital Strategy Alignment

The recent Program and Service Review (PSR) for the City of Thunder Bay highlighted various opportunities to leverage technology and recommended the development of the Corporate Digital Strategy. Perry Group Consulting Ltd. was hired to facilitate the development of the strategy. Given the important role technology plays in the recruitment, selection and hiring process, careful attention has been placed on ensuring alignment between this project and technology related recommendations and the Corporate Digital Strategy. The strategy provides a governance framework and principles to guide future information technology investments.

Several of the current state findings highlighted in the Corporate Digital Strategy are similar to this report's findings, such as the underutilization of major systems such as SAP. For example, the City currently owns the Position Management Module but because the functionality is currently underutilized, recruitment staff must maintain a number of excel databases to track critical information. An effective Position Management Module is the foundation for developing automated workflow and for system integration for many Human Resource needs.

The Corporate Digital Strategy concluded that "a new HR management system, based on SAP is required." Below you will find an extract from the report (page 96) dealing specifically with the HR management system.

6.2.4 Comprehensive HR Process Management System

One of the City's most important assets are its people; they also represent one of the largest costs, so it is critical to effectively manage the workforce from onboarding to retirement using digital processes rather than paper-based employee files.

The City's current employee records are largely paper-based or tracked in numerous spreadsheets. HR processes such as recruitment and training tracking must be modernized. Existing process management is extremely time consuming, inefficient and prone to error and the management of data related to processes consumes much HR staff time.

It is important to note that this is a drag on the whole organization – something that inhibits organizational flexibility and agility and that doesn't provide management with the insights that a more comprehensive and effective HR solution could.

A comprehensive HR management system is a corporate-wide solution, not simply a "system for HR", and thus must meet the needs of the whole organization (leadership, management, staff (part-time, full-time)).

A new HR management system, based on SAP is required.

Implementation of such a solution will likely address the following needs and capabilities:

- Position management.
- Employee records.
- People metrics and analytics.
- License and training tracking.
- Time and attendance.
- Shift scheduling.
- Applicant tracking and online recruiting.

- Learning management.
- Succession planning.
- Performance management.
- Absence management.
- Employee self-service.
- Health and safety.

We recommend that consideration also be given to historic data digitization and the need to load prior employment history and records into the system, prior to go-live.

This work is dependent upon the SAP roadmap identified above and thus, some interim solutions may be required until a more comprehensive solution can be tackled in 2023. Specifically, interim improvements to the shift scheduling and recruitment processes are anticipated in 2022.

Source: Grant Thornton LLP - Municipal Program and Service Review

The reference to some interim solutions to the recruitment process during 2022 is significant and guides the formation of the transitional recommendations outlined in this report. This will allow time to fully understand the functionality and integration capabilities with SAP of the current iCIMS (Applicant Tracking System). It is also important to note the reference to Position Management and the need to build it into the SAP Roadmap.

The guiding principle of the Corporate Digital Strategy is that enterprise systems should be deployed if they meet at least 80% of business needs to reduce the number of systems that the City operates. This would mean the focus should be on re-using existing systems before purchasing new systems.

2.4.2 iCIMS (Applicant Tracking System)

There are many different applicant tracking systems currently utilized by organizations. Ongig, a leading source of recruitment technology research, recently conducted a study of over a thousand of their clients in 2020 to identify which applicant tracking system their clients were using. iCIMS was listed in the top four.

The iCIMS system was implemented by the City in 2017 as a cost effective solution to move from a paper based application process to an online solution. At the time this was a significant achievement and an example of modernizing the HR business environment. The implementation of iCIMS resulted in a number of positive improvements when compared to the previous paper based application approach. These included:

- allowing hiring supervisors access to applications faster;
- advancing the organization's ability to attract applicants from beyond Thunder Bay;
- presenting a more modern experience to candidates than the previous paper application approach previously used; and
- allowing for supervisors to carry out some tasks paper free.

One unintended consequence of moving to an online application system is that the time and effort to apply is greatly reduced for applicants. As a result, applicants are more likely to submit resumes to a greater number of jobs regardless of their qualifications. The implication for organizations is that the inflow of applications increases drastically. In the absence of technology solutions that can screen candidates based on qualifications, the workload for the Recruitment Team and hiring supervisors increases. In 2019, the City received over 15,000 online applications. This was a 50% increase from the 10,000 paper applications received in 2017.

As part of this review, the consultants received a demonstration of iCIMS to better understand the system capabilities. The demonstration raised some additional questions but also highlighted that the current functionality available through iCIMS is being underutilized. In addition, the demonstration highlighted that the iCIMS system is flexible and highly configurable by the client organizations and has great potential for screening job applicants for basic job specific qualifications.

The original implementation plan for iCIMS called for a three phase implementation. The first phase was to select the solution and convert open competitions to the online format. Phase two transitioned the City's internal job postings and application processes to iCIMS. The third phase was intended to convert the manual shortlisting process to an automated process.

The third phase was not completed because the Recruitment Team did not have the resources or time to implement. While the first two phases were completed using existing staff, the more complex process of implementing screening and shortlisting required additional resources and stalled. This highlights the need for additional resourcing to implement automated shortlisting and screening questions.

The current configuration of the iCIMS system utilizes very limited screening functionality and is restricted to a few organizational questions. Not surprisingly, having to review competition files that included unqualified candidates was the number one complaint of hiring supervisors. Recently, the organization has selectively utilized more of the screening functionality for Firefighters and other competitions that historically receive a large number of applications.

iCIMS is a cloud based solution. This means upgrades and enhancements are developed and implemented by the vendor. It allows user organizations considerable flexibility to configure the system to meet their business needs. Although organizations are no longer building the solution, they are responsible for configuration of the system to ensure their organization maximizes the system's potential.

When the City of Thunder Bay implemented iCIMS, the primary focus was on implementing the capacity for candidates to apply electronically without changing the recruitment process. The paper application form was replicated in an electronic form and the screening process was generally unchanged. This means that in some cases, the hiring supervisor still reviews the application, cover letter and resume when screening candidates for shortlisting. There may be an opportunity to take a more focused approach to collecting candidate information that would reduce the hiring supervisor time spent on assessing candidates.

In the past, implementing an applicant tracking system was about gathering, grouping and distributing applications. Today, these systems are part of a more robust HR information system ecosystem offering greater functionality to increase efficiencies.

Common features built into an integrated solution include: initiating the job requisition, repository for job descriptions, screening, applicant listing, ability to shortlist and record decisions, interview scoring record and interview notes upload, HR and hiring supervisor dashboards to monitor the process, offer letter composition, email notification to unsuccessful candidates, and links to onboarding and payroll. These features are currently not utilized or are not available in the iCIMS product.

Since implementation, iCIMS has regularly increased the functionality of the product. A recent example of increased functionality was the increase in the number of screening questions an organization could utilize. This highlights the need to ensure a resource within the Recruitment Team has the necessary time to be a business system administrator/superuser and ensure that as new functionality is released by iCIMS, the City evaluates whether to implement it or not.

All cloud based applicant tracking systems require regular oversight from a superuser to remain knowledgeable about changes and new functionality. This means the City should assign responsibility to monitor the system development to a superuser and, in conjunction with Corporate Information Technology (CIT), evaluate improvements and decide on whether to enable the new capabilities. It may be appropriate to assign this role in the interim to an individual assigned to implement the transitional recommendations.

2.4.3 Non-iCIMS Technology

The lack of system integration and activation of the SAP position management module has resulted in recruitment staff creating several workarounds and using Excel to track important process data and milestones. These databases provide valuable information that is relied on to track the completion of tasks. This work is time consuming and adds complexity to the process that requires a prolonged training timeline for new staff.

We could not identify a database that could be discontinued immediately. Some further consultation with CIT could minimize database use and create some efficiencies while an optimal solution is being developed.

The Corporate Digital Strategy has identified the implementation of Microsoft 365 as a priority. The implementation of Microsoft 365 will have immediate benefits for the organization by creating a collaborative online work environment. The current version of Excel limits user access to a single individual at a time and negatively impacts efficiency. Implementation of Microsoft 365 would eliminate the problem of access by a single user. CIT staff have also identified a workaround to the single user access that should be pursued as the Recruitment Team waits for the Microsoft 365 rollout.

The other implication of fragmented databases is that it is extremely difficult to do performance reporting or analysis as each request for data requires considerable effort. Developing an HR systems roadmap based on fully integrated modules will significantly address the current issues around data reporting.

2.5 Candidate Experience and Attracting Talent

In today's labour market, it is imperative that an organization presents an appealing image as an Employer of Choice and provides a positive candidate experience. The candidate is looking for a simplified process for applying to jobs to minimize the amount of effort associated with applying. A candidate's impression of an employer is formulated based on the organization's website, the job posting, and the application experience.

The number one rule to creating a great candidate experience is to think like a candidate. The consultants adopted a 'walk in the shoes' approach to review the City's job website, job postings and the iCIMS application process from the perspective of a potential candidate. Our findings on the candidate experience are provided below.

2.5.1 City of Thunder Bay Job Website

The Conference Board of Canada reported that organizations continue to have strong

reliance on passive search tactics to reach potential candidates. Corporate websites are still the number one approach relied upon by organizations to attract talent. The recent Talent Management Benchmarking survey highlighted that over 90% of organizations relied on websites to attract candidates. An organization's website is often the first window an external candidate has to form an impression of an organization.

A 2019 survey conducted by Talent Board found company career sites proved to be the most valuable channel with 60% of candidates identifying the company career site as valuable. How an organization is presented as an employer in job openings matters. Candidates are looking for an informative and positive experience that is focused and provides easy access to the information they are seeking.

The added benefit of corporate website postings is extended advertising reach through aggregator websites such as Indeed.ca and Eluta.ca. These websites scrub sites and repost the job ads with minimum effort and no cost. The result is attracting candidate attention from beyond the immediate geographical region, which can be extremely helpful for hard-to-fill positions.

As part of the review, the consultants evaluated the current jobs website from the perspective of a candidate as well as feedback received during the stakeholder interviews.

In general, the current City of Thunder Bay Job Pages information is not presented in a concise manner and does not provide the positive candidate experience that is required in today's competitive labour market. A large amount of space on the first page is devoted to a picture. This makes the potential applicant scroll down the page to find information that they are interested in. While visuals are helpful and important, they must fit the intended purpose. Based on our observations, there is a strong possibility the potential candidates will lose interest before accessing the most important information.

There is great potential in modernizing the website and using it to promote hard-to-fill positions and peak the interest of potential candidates. Appendix 7 provides a potential alternative to the current Jobs page. It would allow for the organization to feature a hard-to-fill position on the Jobs page. Candidates may only visit the landing page instead of exploring further postings. For this reason, it is imperative the critical information is featured easily and in an engaging manner. Current resourcing levels limit the ability to modernize the current website and maintain it as an active sourcing channel to recruit talent.

We noted that the recently created employment videos, and in particular the fire recruitment process videos, are of high quality and provide positive messaging that can

grab a potential candidate's attention and interest. Video is a critical element in marketing job openings and is effective for peaking interest in hard to fill positions.

The website also provides assistance to potential candidates residing outside of Thunder Bay with important information on relocating by providing a link to the Go To Thunder Bay website operated by Community Economic Development. Leveraging the materials produced by others is another leading practice in recruitment. Selling the community is as important as selling the job when attracting talent.

2.5.2 Job Postings

On the City of Thunder Bay jobs site, all job postings begin with a significant preamble that further detracts from the candidate experience. While the information contained in the preamble may be important, few employers lead with it on a job posting. The focus is on generating interest from qualified potential candidates by clearly communicating the job responsibilities and qualifications.

The current job postings are too busy and require an applicant to scroll several screens at times to review the job responsibilities and required qualifications. This can create a negative experience, especially if an individual is interested in reviewing several openings. This has the unintended consequence of creating applicant fatigue that results in the applicant not reading the most important information. This can also result in unqualified applicants applying for positions because they did not scroll down to read the required qualifications.

Clean, concise job postings are critical to catch the eye of potential applicants and allow them to assess potential fit. See Appendix 5. One issue raised by hiring supervisors was that applicants applied for a part-time or temporary position unintentionally when they thought they were applying for a full-time position. This is frustrating and time consuming for both the hiring supervisor and the applicant.

Posting hard-to-fill jobs for an extended period of time is called an 'open posting' and is a leading external practice. However, an opportunity may be lost by not clearly identifying that individuals should apply and will be considered immediately. Having a posting close date that is several months in the future may confuse applicants and lessen the urgency to apply.

The current practice of using the content directly from the job description is efficient and creates the potential to automate job postings in the future should job descriptions be hosted on the applicant tracking system. This would eliminate steps in creating a job posting.

2.5.3 Establishing a Candidate Profile and Applying for Position

In today's labour market, employers need to ensure their job application process creates a positive candidate experience and avoids what is known as a 'drop out' applicant. Drop out occurs when an applicant decides that they are not going to complete the application process part way through.

In general, applicants dropping out mid-process is a negative. There can be many reasons for candidates not completing the application process. The most common reasons are the process:

- is confusing;
- takes too long;
- is unfriendly and makes the applicant question whether this is the employer they want to work for; and
- is broken and they cannot proceed in the application process.

To avoid the risk of qualified candidates dropping out, a best practice is to focus on minimizing clicks and shortening the application process.

There can be positive reasons for when an applicant decides not to finish applying and drops out part way through the process. It could signal that the screening questions are effective and the applicant has concluded they are not qualified.

Some stakeholders indicated the current process for setting up a candidate profile and for applying was time consuming and intimidating.

To test the system, the consultants created candidate profiles and applied to a job posting. Based on our experience with applicant tracking systems, the current process should be simplified and focus on the critical information that is required. The time to complete a profile was considerably longer than the tests we conducted on the websites for the Region of Peel, City of Guelph and the City of Windsor.

2.5.4 Mobile Interface

Gartner Group reported a greater focus on Mobile Career Applications in 2020 as individuals transitioned to mobile devices as a primary technology tool. Mobile optimized career pages are increasingly being viewed as a best practice by allowing candidates to apply and complete the application process using their phone or tablet. A slick mobile interface improves the candidate experience and creates a great first impression for younger job seekers. One organization noticed as many as 20% of applicants applied using mobile devices, with an increasing number gravitating to cell phones.

An additional benefit to increased mobile connectivity is that hiring managers can move away from desktops and laptops and manage the recruitment, selection and hiring processes from phones and other devices. In our review of the City of Thunder Bay application portal, using a mobile phone provided the end user with a positive experience when applying for a position.

2.5.5 Job Posting Alerts

Job Alerts are an excellent way to reach out and notify potential candidates. It allows a potential candidate to sign up and be notified when jobs of interest are posted. It also provides a feature to forward postings to potential referrals, thereby enlisting potential candidates to help find additional applicants.

Currently, a potential candidate cannot sign up to receive alerts when a posting that fits their criteria is posted. The ability for an organization to send targeted job alerts to potential candidates is an important tool in engaging and maintaining a relationship with potential candidates.

Job Alert functionality is a best practice and found on almost all applicant tracking systems. The Job Alert feature was utilized by the majority of municipalities in the benchmark survey.

Offering Job Alerts is dependent on an organization having defined job families that would allow an applicant to sign up for a grouping of similar jobs. The City of Thunder Bay is currently exploring the most appropriate manner to group jobs. Discussions with iCIMS are also underway to understand the capabilities under the current licence arrangement and options for enabling candidate job alerts.

2.6 Candidate Responsibilities

The current state review identified that in some cases recruitment and supervisory staff complete a number of checks and additional tasks because a candidate has not provided accurate information. This is inconsistent with HR and hiring supervisor roles and responsibilities. The candidate should be accountable for providing accurate information and this information should be relied on in the selection process. Given the high volume of applications received, it is not reasonable to continue manual checking on internal applications.
Two examples of situations where this has occurred:
- The candidate did not include an employee number or indicate they are an employee.
- The candidate did not indicate whether they had a driver's licence and what type it was.

In both instances, additional work was undertaken to investigate. Benchmark municipalities confirmed it is the candidate's responsibility to accurately complete their profile and submit the required information for each position they apply to. At the benchmark organizations, candidates were assessed on the information they submitted.

By establishing clear expectations for external and internal candidates, the need to check and double check with candidates and manually check with other HR systems would be eliminated. This requires a carefully crafted change management and communication plan. Given that unionized employees may be impacted, labour relations should be consulted.

Candidates should be solely responsible for providing all required information accurately. It is important for the City of Thunder Bay to establish clear expectations of candidates that ensure the accountability for providing accurate information rests with the candidate and not HR Assistants for hiring supervisors.

2.7 Process Accountability

Recruitment staff currently play a significant role in process oversight and perform certain tasks to mitigate risk to the organization. During the stakeholder interviews several tasks related to oversight and risk mitigation were identified as delaying the hiring process, and stakeholders felt this could be addressed through greater role clarity.

Recruitment staff review competition files to identify potential problems. This may involve discussions with labour relations in the case of unionized positions when the candidate with the greatest seniority is not selected, or in proposed underfilling situations.

Accountability for the hiring process, including following the corporate process and abiding by the terms of the collective agreement, should lie with the hiring supervisors. When an issue or concern is raised with the hiring decision, the hiring supervisor should be accountable to their manager.

In general, while recruitment staff should provide advice to the hiring supervisors, they should no longer conduct an extensive review of the competition file prior to preparing the job offer. There are two exceptions to this recommendation:

- In cases where the hiring supervisor selects a leading candidate who does not meet the full qualifications of the position it is appropriate for recruitment staff to review the file to confirm that an underfill is appropriate, in consultation with labour relations if necessary.

- In union positions where the hiring supervisor selects an external candidate over an internal bargaining unit applicant. The impact to the external candidate is significant in the event of a successful grievance, and this warrants a brief review from recruitment staff to ensure the process was followed and there are no red flags that warrant further review or consultation with labour relations.

Notwithstanding these extra steps, the hiring supervisor remains accountable for the decision, not the recruitment staff. In these situations, the risk to the organization and integrity of the hiring process is great enough to warrant extra caution.

During stakeholder consultation, some hiring supervisors identified that they would prefer to make the initial contact with the preferred candidate to present the conditional job offer as this may speed up the offer process. It was noted that this was an opportunity to make the offer more personal and to start building a working relationship with the candidate. The benchmark survey confirmed that the majority of organizations centralized the job offer function to minimize risk and to maximize process efficiency associated with candidates satisfying employment offer conditions, particularly police checks. No change in responsibilities for the current offer process is recommended.

2.8 Employment Outreach

The City of Thunder Bay has all the foundational pieces in place to build a strong and robust employment outreach program. This was confirmed from our review of documents and current practices. Many leading practices are already in place with respect to creating a diverse workforce and some of these include:

- a commitment to measure workforce composition every three years and the expansion of data collection and analysis since 2005;
- the recent collection of information on individuals from the 2SLGBTIQ+ community;
- data collection on job applicants; and
- data analysis by different occupational groups.

We observed the data was segmented by occupational groups. This allows an organization to gain deeper insights and to place an organizational context when developing solutions. Segmenting data is key to developing targeted solutions.

The City's Indigenous Relations Strategy 2021-2027 (Strategy) includes actions that are related to hiring and retaining a diversified workforce:

- The Strategy identifies a number of opportunities for Human Resources to collaborate with the Office of Indigenous Relations in the development of an employment outreach program. The strategy identifies the importance of

respectful relations and the support that they could provide to ensure appropriate engagement approaches with Indigenous partners. This is a critical element of any future employment outreach program.

● The Strategy also highlights a best practice that could be extremely valuable in a future employment outreach program. It identifies the need to, "revive and coordinate City Indigenous Employee Network to identify priorities and engage staff for further retention." Although the strategy focuses on the benefits of retention, these networks can be valuable in providing potential employee ambassadors for future employment outreach events.

● The Strategy also identifies the need to create responsive recruitment activities in partnership with Indigenous employment agencies. This is also a best practice.

The City of Thunder Bay 2019-2024 Multi-Year Accessibility Plan also provides guidance that, "Employment practices are accessible, including how the City of Thunder Bay hires, retains and provides career development opportunities." The 2020 Employment Equity Report highlighted a number of outreach and retention initiatives. A noted best practice is to ensure efforts also focus on existing staff.

The City of Thunder Bay Indigenous Relations Strategy 2021-2027 and the Multi-Year Accessibility Plan 2019-2024 and the 2020 Employment Equity Report and the City's Employment Outreach & Retention Plan identify a number of actions to advance the City's commitment to Diversity, Equity and Inclusion (DEI). Additional resourcing is required in order for Human Resources to effectively collaborate with the Indigenous Relations Office, the Accessibility Office, and advance employment outreach efforts within the organization and the community. Building relationships is personal and requires time. A supplemental report on diversifying the workforce and employment outreach has been provided to the City.

2.9 Other Opportunities to Shorten Recruitment Process

Interviewed stakeholders identified a number of opportunities to shorten the length of the recruitment process and reduce the associated workload for staff. Some of these opportunities would require union agreement. The following four practices were identified:

Job Postings Appearing on Pay Stubs: Hiring supervisors identified the requirement to place job postings on pay stubs impacts their ability to post vacancies in a timely manner, which also delays communicating internal job opportunities to employees. This requirement is the primary reason that the current job posting process is based on a two week batch posting cycle. This concern was outlined in the Grant Thornton LLP phase two report.

Two Day Provision To Accept a New Position: Several hiring supervisors questioned the need for allowing internal staff two days to decide whether to accept a new position. In some cases, employees take the maximum length of time before turning the position down, and this in turn delays offering the vacancy to the next qualified candidate. Union agreement may be required prior to reducing the number of days to accept a new position.

Temporary Employees - Short Term Assignments and Requirement to Terminate: Collective agreement provisions require that temporary employees are terminated at the end of each temporary assignment. This means terminating a temporary employee each time their 'assignment' is over, even if the individual frequently works irregular hours from week to week. This creates additional repetitive administrative work (processing forms, data entry, etc.) for both HR staff and hiring supervisors. Stakeholders who raised this issue believe this process adds no value and does not reflect the realities of a dynamic work environment that requires a flexible workforce.

Staff Movement Within Temporary Positions: Some stakeholders raised the issue of the continuous hiring cycle caused by the number of staff that move into and out of temporary positions. This results in additional work for all involved in the hiring process to backfill positions, and presents challenges for bargaining unit employees as it creates uncertainty about which vacancies are actually available for career development opportunities. One reason shared for this movement is that staff may be trying to accumulate seniority in a particular position to secure potential bumping rights. Understanding the reason for the movement, and whether current provisions should be modernized to address any unnecessary disruption through temporary movements, should be reviewed given the impact on employees and respective operating areas.

Given the above items are governed by the terms of current collective agreements, any warranted changes would have to be addressed in future negotiation.

Section Three: Labour Market Challenges and Risk

The recruitment process is an important element in any Talent Management system, but it does not fully address challenges that employers are facing in the current labour market. While improvements in a candidate's experience, enhanced recruitment attraction through social media, expanded employment outreach and partnering with educational institutions are important, they only deal with one side of the issue and assume there is a healthy supply of skilled job candidates.

The pandemic has highlighted labour shortages and expanded the number of occupations that are difficult to fill. The City of Thunder Bay, like other employers, is already experiencing difficulty hiring for certain positions such as paramedics, nurses and transit operators. The reality is that for some positions it will be extremely difficult to find qualified individuals in the future. There simply will not be the traditional supply of potential candidates for select positions.

Northern Policy Institute (2020) publication examined vacancy rates across different National Occupational Classification (NOC) for the Thunder Bay Census Metropolitan Area. This report also highlighted the challenge Northern Ontario is facing with changing workforce demographics and the younger generation leaving these communities.

According to Statistics Canada, the job vacancies increased in all provinces from the second quarter of 2019 to the second quarter of 2021, with the largest increases in Quebec (+53,700; +38.3%) and Ontario (+51,300; +24.1%). Vacancies in health care and social support roles increased by 40,800 (+59.9%) from the second quarter of 2019 to the second quarter of 2021, the largest increase of any sector.

Retirement Risks:

Research analysts predicted that many staff were deferring retirements during the pandemic. A recent RBC Economic publication reports, "A surge in retirements will worsen Canada's already declining labour force participation rate (...) with a rise in demand where job vacancies are back at pre-crisis levels, we expect this increase in voluntary job turnover to exacerbate post-pandemic labour shortages."

One of the biggest workforce risks identified by employers is related to changing workforce demographics associated with increased retirement and potential loss of organizational knowledge.

Succession Planning:

Organizations that strategically invest in the development of staff and identify critical roles understand the external labour market has limitations. When an organization

develops a succession plan and supporting actions, they are taking control of their workforce challenges.

Succession planning is not solely focused on management positions. In fact, developing pools of talent for critical positions is more likely to occur in highly specialized technical positions.

In the absence of a workforce and succession plan, organizations will be reacting to the external labour market. Understanding likely future organizational demand for new staff will allow an organization to better plan and develop workforce strategies that will allow an organization to move beyond recruitment of external candidates.

Retention:

As the labour market tightens and candidates with specialized skills become scarce, it is imperative that organizations are proactive and invest in an employee retention strategy. Retaining a skilled employee is the best outcome for an organization. Recruitment for a replacement employee is secondary.

A number of organizations focus a great amount of attention on retirement risk and recruitment of new staff at the expense of understanding potential voluntary turnover risk and developing an employee retention strategy. While there are a number of personal and external factors that drive an individual's decision to leave an organization, there are also reasons that are in the control of the organization.

In a challenging labour market developing a focus on employee retention is critical and drives the push by many organizations to create a respectful, inclusive and desirable workplace culture.

This highlights the need for employers to be proactive and invest in connecting their HR processes to strategic workforce planning and regularly conduct internal scans and external labour market scans for labour risk assessments.

Understanding potential risk pertaining to an organization's current workforce and forecasted workforce requirements is critical to ensure an organization has the ability to provide the services that citizens rely on.

For the City of Thunder Bay, this means understanding the potential risk and impact of future retirements and voluntary employee turnover. The development of the HR Strategic Plan provides an opportunity to incorporate an in-depth workforce planning review to identify risk and future needs to inform the development of goals and actions.

Impact of Pandemic

In addition to making it more difficult to hire, the pandemic has also influenced the way organizations hire. Video interviews that were sparsely used in the past have become a standard. Organizations, hiring supervisors, and candidates are recognizing a number of benefits from video interviews. Hiring supervisors are able to consider candidates from other labour markets for little investment. Hiring panels can assemble without incurring the loss of productivity that was previously associated with travel.

One of the greatest impacts of the pandemic on the workplace was disrupting the way many employees work. The ability to work remotely expanded to organizations that were previously resistant or slow adopters overnight. As health measures recede, organizations will be challenged to provide greater flexibility on an ongoing basis. The environment has shifted significantly and organizations need to prepare.

Development of an HR Strategic Plan

The development of a comprehensive HR Strategic Plan is scheduled to commence in 2022 and will position the organization well to meet future labour market challenges as identified above.

Section Four: Recommendations

The recommendations are presented to guide the City of Thunder Bay in modernizing the recruitment, selection and hiring process with an optimal solution that is aligned and consistent with the Corporate Digital Strategy. The recommendations also recognize that in the interim, a number of process efficiencies are possible that would address a number of the concerns identified by stakeholders.

The goal of the interim recommendations is to address the workload capacity issue that the Recruitment Team and hiring supervisors identified. Failure to create some capacity for HR Assistants will make it difficult to adopt and implement other interim solutions that hiring supervisors would find beneficial. Without freeing up capacity or adding temporarily to their capacity, interim solutions are likely to stall.

To assist hiring supervisors, the priority is to implement job specific screening questions to reduce the amount of effort required to shortlist job posting files and to implement recommendations that address shortening the period of time from candidate selection to new employee start date.

Recommendations have been categorized by themes and assigned a suggested timeframe. The assigned time frames used are **Immediate (I)** - next 6 months, **Medium Term (M)** - 6 to 12 months and **Long Term (L)** - year and beyond. Some recommendations are also flagged as a priority so that they can be addressed at the beginning of the process to free up capacity to support the implementation of the remaining recommendations.

4.1 Candidate Experience and Talent Attraction

The recommendations below are designed to modernize the front end of the recruitment process and address concerns identified during the review. In many cases, the recommended change is focused on how information is presented and should have a significant impact on attracting applicants by focusing candidates on jobs they are qualified for and saving hiring supervisor's time.

Recommendation 1: Simplify and Redesign the Job Posting *(Immediate)* The current Job Posting contains too much information and buries the key information of job responsibilities and qualifications. A redesigned Job Posting should clearly highlight whether a position is temporary, part-time, or full-time to avoid individuals applying for positions they are not interested in. Open postings should emphasize that individuals apply now to be considered now, creating a sense of urgency.

Recommendation 2: Streamline Candidate Online Profile *(Medium)* The current profile is cumbersome, time consuming to complete and, for some, intimidating. Creating a positive and focused profile will enhance the candidate experience. This

recommendation is tied to Recommendation 8 Reconfigure iCIMS Candidate Profile, Resume and Job Specific Screen Questions.

Recommendation 3: Continue Initiative to Expand Social Media Marketing and Sourcing *(Immediate)* Social media provides organizations a significant opportunity to cheaply reach diverse audiences. The City has an action plan to expand its social media presence to advertise targeted job openings. This is a significant step in modernizing the image of the City as an employer.

Recommendation 4: (Priority) Establish Clear Expectations of Candidates *(Immediate/Medium)* Currently hiring supervisors and recruitment staff spend extra time verifying the information provided by candidates, and tracking down information to satisfy pre-employment conditions. The City should shift accountability for these tasks to the candidate, and evaluate candidates based on the information submitted in the application process. Likewise, deadlines should be set within which candidates must satisfy pre-employment conditions. This will address concerns raised and eliminate non-value add work by placing the responsibility for completing tasks with the candidate. This should apply to external and internal candidates. Appropriate change management and communication is required and labour relations should be consulted.

Recommendation 5: Modernize the City of Thunder Bay Job Website *(Medium)* Several issues have been identified with the current design of the website, as well as potential enhancements to attract candidates to hard to fill jobs through a greater visual presence. Appendix 7 provides an example of a revised web page that addresses the items identified in the report.

Recommendation 6: Continue to Investigate iCIMS Job Alert Capability *(Long Term)* Prior to launching a candidate job alert capability, the City will need to categorize jobs into meaningful job families that candidates can relate to and that would be aligned to future SAP Position Management definitions. The SAP roadmap for HR is being constructed during 2022/23 and will provide guidance on implementation of this recommendation. Organizations that implement job alerts have job family groupings and a modern website established. Targeted expansion of social media marketing will have a greater impact on sourcing new talent.

4.2 Optimal Technology Recruitment Solution

Modernization of the recruitment process will require the organization to transition from an applicant tracking focused system to a system that supports an end-to-end recruitment, selection, hiring and employee onboarding process.

Recommendation 7: Comprehensive End to End Technology Solution Fully Integrated with SAP *(Long Term)* The optimal recruitment technology solution will be driven by the upcoming SAP Roadmap, an in-depth evaluation of iCIMS technology, IT

Governance process, and approved funding. The optimal solution must be fully integrated with SAP, and must contain enhanced applicant screening, automated workflow, embedded forms and data analytics dashboard. This would eliminate standalone databases. A detailed business plan would be presented as part of the Corporate IT Governance process.

4.3 Interim iCIMS Solutions

The current iCIMS system functionality is underutilized. While awaiting a comprehensive end to end technology solution, additional iCIMS functionality may be available to address interim or longer term needs.

Recommendation 8: Reconfigure iCIMS *(Immediate/Medium)* Revising the application process will create numerous opportunities to enhance the candidate experience and address the number request raised by hiring supervisors, which is to improve screening of candidates for required job specific skills. The timing of this recommendation is dependent on several factors, including resources and an effective change management plan. A phased transition should be considered based on specific positions or unions. There is significant time saving potential for hiring supervisors who are required to screen large numbers of applications.

The phasing out of the traditional online job application and cover letter is recommended, with a new focus on a shortened candidate profile submission of a resume (if required), and answering a set of job specific screening questions. The resume requirement may be eliminated on an exceptional basis at the request of the hiring supervisor. In these situations, the hiring supervisor would have access to the basic candidate profile and the answer of screening questions. This may be ideal for entry level positions where job requirements are relatively few or in positions identified as non-competitive that are tied to seniority.

This focused approach for candidate information collection will save hiring supervisors time when shortlisting candidates.

Recommendation 9: Investigate Hosting Job Descriptions in iCIMS *(Medium)* A common feature of applicant tracking and recruitment systems is to host job descriptions in the system so that job postings can be created more efficiently. The City of Thunder Bay currently has an accessible job description library that supervisors use. The implementation of hosting them in iCIMS must be investigated to avoid any unintended negative consequences.

Recommendation 10: Create Job Offers Directly from iCIMS *(Medium/Long Term)* This is a common feature that organizations utilize to streamline the process of creating offers. Given the number of unions and unique employment terms, an assessment of

overall effectiveness would need to be made. Working within one integrated system is best practice and typically more efficient.

Recommendation 11: Integrated Digital Calendar Scheduling for Interviews *(Immediate/Medium)* The iCIMS system has the capability to facilitate the scheduling of interviews with shortlisted applicants. This should be considered as an option along with Recommendations 15: Implement Alternative Approaches to Scheduling.

Recommendation 12: Earlier Access to Candidate Applications *(Medium)* Several hiring supervisors asked that they be able to view applications while a job posting is still active. This is particularly relevant for hard to fill jobs where the open posting period is utilized. Further investigation of system capability with iCIMS is required to ensure that system security and candidate privacy is not compromised. Allowing a select number of hiring supervisors access to the system could address concerns about timeliness.

Recommendation 13: iCIMS Superuser *(Immediate)* As a cloud based application, iCIMS regularly releases new features and changes to functionality. It is recommended that the City assign responsibility to monitor iCIMS new features and release notes to a superuser. In conjunction with Corporate Information Technology (CIT), the superuser will evaluate improvements and determine whether to enable the new capabilities. It may be appropriate to assign this role in the interim to an individual responsible for the implementation of the recommendations.

4.4 Interim Non iCIMS Technology Solutions

A number of potential interim technology solutions were identified that merit a closer review.

Recommendation 14: (Priority) Multiple User Spreadsheets Capability *(Immediate)* CIT has identified a way for HR Assistants to access the same spreadsheet at the same time. This would address one of the frustrations they currently experience when completing tasks related to tracking data.

Recommendation 15: Expedite HR Access to Microsoft 365 Products *(Medium*) Prioritizing access to Microsoft 365 tools for the entire division of HR would significantly enhance the ability and efficiency associated with working on the same document. This could open up a host of other improvement opportunities during this interim period before the implementation of the optimal solution. Organizations that have shifted to cloud collaboration software experience significant gains in efficiency and quality.

Recommendation 16: Duplicate or Copy TB483 Functionality *(Medium)* Hiring supervisors responsible for bulk hiring are required to fill out a blank TB 483 Form for each individual hired. The recommendation is for the supervisor to create a duplicate TB 483 with job specific information which the supervisor can edit for each hire to add employee specific information. This would be a significant time savings for hiring

supervisors who hire multiple people for the same position. This functionality may also be applicable to the Request to Hire online Form.

Recommendation 17: (Priority) Implement Alternatives Approaches to Scheduling Meetings - Digital Assist Scheduling App *(Immediate/Medium)* Scheduling apps are used to provide a number of individuals with access to specific time slots available for an interview. Candidates select a spot and confirm their interview. The process is confidential and no candidate knows who else is booking. This avoids the process of chasing candidates to schedule interviews and is more efficient for hiring supervisors.

Consideration should be given to expanding this capability beyond hiring supervisors to the scheduling of meetings with external parties in general. The use of this technology could be used to shift the scheduling of some meetings from the HR Assistants to free up time. It is common for professional staff to schedule their own meetings given today's technology.

Recommendation 18: (Priority) Linking Seniority to Candidate Listing *(Immediate)* Currently, the HR Assistants must manually search for an employee's seniority and manually add the information to the internal candidate listing prior to forwarding to the hiring supervisor. Potential solutions were identified by CIT that could address this issue through a download from SAP. A verification of seniority is currently being conducted that will increase data accuracy and that will allow this automation to happen with confidence. Placing accountability on the candidate to identify themselves as an employee and include their employee number on their applicant profile will also streamline this process. This item has been actioned and work is underway to resolve the issues.

4.5 Process and Procedure Related

Recommendation 19: (Priority) Require one Formal Probationary Review *(Immediate)* Many positions within the City currently require three probationary reviews to be completed by the hiring supervisor, which is time consuming process for both the hiring supervisor and the HR Assistants who manually track completion and follow up with the supervisor when reviews have not been completed. When a specific number of probationary reviews are expected and all are not completed the organization runs the risk that the outcome of the probationary period may be called into question. The municipal benchmark standard is a single formal probationary review supplemented by additional performance discussions when required.

The probationary review date for newly hired or transferred employees should be stored in SAP and not on an Excel spreadsheet. At the time of hire, the HR Assistant would provide the supervisor with the probationary report and date for completion. The HR Assistant would not follow-up or track.

Recommendation 20: (Priority) Maintain Nepotism Procedure but Eliminate Name Recognition *(Immediate)* The name recognition process was raised by stakeholders as an unnecessary allocation of time to get General Manager approval. No municipal benchmark organization has a name recognition procedure. Eliminating this requirement would align Thunder Bay with benchmark municipalities and save hiring supervisor, HR Assistants and General Managers time and reduce the time to fill.

Recommendation 21: Reference Check *(Medium)* The reference check process should be amended to better fit the risk and value-added benefit. It is recommended that internal hires have a single reference from their current supervisor and that the requirement for external candidates be reduced from three references to two references. An email or digital reference check process should be introduced as an option for hiring supervisors. Additionally, hiring supervisors should be provided the option to outsource reference checks to a third party with expenses incurred by the hiring department.

Recommendation 22: Satisfying Conditions of Employment *(Immediate/Medium)* The City should explore allowing flexibility in allowing some new hires to start employment prior to satisfying all employment conditions in extenuating cases. An example might be where an individual is waiting for a Criminal Record and Judicial Matters Check (CRJMC) Type 1 police check to be completed in situations where the candidate lives outside of Thunder Bay. Continued employment would be conditional on the City receiving a satisfactory police check by a specified date. HR Assistants currently track the status of employment term completion manually. This change would require manual tracking to ensure the condition is satisfied by the designated date similar to the tracking that currently occurs. Given the competitive job market and the impact of losing a potential candidate at this late stage of the process this additional flexibility is recommended. This should be restricted to positions where the job market is extremely competitive and not apply to all job openings.

The City should also explore whether the process of clearing conditions associated with driving a city vehicle could be expedited by having hiring supervisors review whether a position requires a G or G2 licence and in the case where the employee will not be driving a city vehicle having the employee sign a form confirming they will not.

Recommendation 23: Posting Flexibility Phased in as Capacity Become Available *(Medium/Long Term)* Additional flexibility to the post more positions off-cycle is conditional on freeing up HR Assistant time with the implementation of recommendations in this report. Current workload does not allow for a shift from the posting process. It is recommended that the organization move from the current bi-weekly batch posting process to a weekly batch process for all groups that are not subject to the pay stub posting requirement. It is recommended that this is phased in overtime as HR Assistant capacity allows starting with CUPE 7 day temporary positions.

There is usually a greater sense of urgency associated with a temporary position because of the immediate needs to cover a short service period.

Recommendation 24: Maintain Recent Improvements and Flexibility *(Immediate)*
Several recruitment process improvements have been implemented in response to the challenging hiring environment and COVID-19 Pandemic. These have been effective and should be maintained. These include virtual interviews, virtual employee orientation, open job postings and selective off-cycle job postings to address urgent needs. The virtual orientation was identified by several hiring supervisors as a more efficient and less disruptive process.

As outlined earlier in the report, employers need to be innovative and flexible to meet the changes of tightening labour markets. Implementing 'open postings' is a great example of finding a creative solution to address an urgent need. It is imperative that deviations from standard practice be limited to only the most urgent or unique situations in order to maintain efficiencies that are achieved through standardization. A recent example of flexibility is the approach to hire Screener positions by advertising the willingness to interview all applicants received which addressed an urgent need with an equally urgent response

Recommendation 25: Bargaining Preparation *(Medium)* In preparation for future bargaining, labour relations should continue to consult with hiring supervisors and the Recruitment Team to identify collective agreement terms that have an adverse impact on the recruitment, selection and hiring process. The preparation should include a review of the four items identified by stakeholders as part of this review. The four items are:
- Job postings appearing on and pay stubs requirement;
- Two days to accept a new position;
- Schedule "A" Temporary Employees - Short Term Assignments and Requirement to Terminate; and
- Staff Movement Within Temporary Positions.

Recommendation 26: Process Accountability *(Immediate/Medium)* The overarching principle is that hiring supervisors are accountable for following the recruitment process and for the quality and appropriateness of their hiring decision. Any issues should be addressed by their manager. The Recruitment Team should continue to perform an oversight review in the areas of underfill candidate selection and where an external candidate is hired rather than an internal union employee who has seniority rights. Conditional job offers should continue to be made by recruitment staff except where this responsibility has been formally delegated such as for non-affiliate hiring.

Recommendation 27: Establish Recruitment Service Standards for Issuing Job Offers *(Immediate)* Establishing service standards for the issuing of job offers will provide clarity to hiring supervisors of the expected turnaround for notifying the

successful candidate. This will start the process of a candidate satisfying any job related conditions and would address the concern raised by hiring supervisors of potentially losing their preferred candidate during the offer stage due to timing.

Recommendation 28: Establish Interview Questions Repository *(Long Term)*
Hiring supervisors identified the need for an interview questions repository to assist them to prepare for interviews. The tool would assist hiring supervisors to select appropriate interview questions based on the skill requirements for the job.

4.6 Resourcing

Recommendation 29: (Priority) Recruitment Consultant *(Immediate)* The Grant Thornton LLP review identified the need for a new position to support the recruitment process. Hiring supervisors also identify the need for this assistance given labour market challenges and difficulty filling hard to fill positions. The role would support the identification of future hiring needs and the development of sourcing strategies for hard-to-fill positions. Responsibilities may include advancing workforce and succession planning, website enhancements, social media marketing, strengthening relationships with post secondary institutions and other strategies to recruit new talent. The role is critical to support the implementation of process improvements and recommendations. Successful implementation of the majority of the recommendations is contingent on this additional resource.

Recommendation 30: (Priority) Temporary HR Assistant *(Immediate)* The review found that the current workload for the HR Assistants is not sustainable and service to hiring supervisors is being impacted. In addition, the implementation of recommendations will require input from the experienced staff to ensure solutions are designed and tested appropriately. Temporary additional recruitment support is vital for supporting the implementation of project recommendations and without it several recommendations will not be implemented. This resource is expected to be in place for up to eight months (subject to review during that period of time) and will be funded by redirecting existing funds within the 2022 budget.

Recommendation 31: Diversity, Equity and Inclusion Consultant *(Long Term)*
The City has a number of foundational pieces in place to build strong employment outreach. To advance these outreach efforts a dedicated resource is required to focus on building relationships through community partnerships. This resource would work to advance the actions outlined in the 2020 Employment Equity Report. This resource will develop and implement programs that will enhance recruitment and retention efforts by fostering an equitable and inclusive workplace that is committed to diversity.

Recommendation 32: Resourcing Optimal Recruitment Solution *(Long Term)*
Identifying and implementing the optimal recruitment solution is a significant project and should follow the approach outlined in the Corporate Digital Strategy for significant

technology projects. Given the volume of work that has been identified to implement transitional recommendations in 2022, work on evaluating an optimal recruitment solution could start in 2023. This will be dependent on the approved SAP Roadmap and budget funding. Dedicated project leads will be required to support the business area and CIT and should be budgeted accordingly.

Section Five: Summary

5.1 Project Management

A critical element in advancing implementation of the recommendations is to address the current workload of the HR Assistants. Recommendations that will have a more immediate impact on lessening some of their workload have been identified as priority. Addressing these items first is an important enabler for implementation of the remaining recommendations.

The recommendations outlined in this report require a project management approach and assignment of a dedicated resource to develop, test and action the recommended solutions. Securing the resources outlined in Recommendation 26 Recruitment Consultant and Recommendation 27 Temporary HR Assistant is vital for adopting a project management approach.

5.2 Collaboration with Corporate Information Technology

The Corporate Digital Strategy has identified a project called HR Recruitment Interim Solutions for the first half of 2022. CIT is a key collaborator with HR on evaluating and implementing all system related recommendations including iCIMS related improvement. Throughout this project, CIT staff have shared their unique knowledge of current systems and influenced a number of the recommendations identified in this report. Continued collaboration will ensure the best outcomes and alignment with the Corporate Digital Strategy. In addition, CIT staff could be a valuable resource in supporting the review of iCIMS release notes to assess potential improvement opportunities during the transition period.

5.3 Change Management

Our recommendations will impact the City's processes, systems, tools, candidates and staff. Several of these recommendations will bring significant change and will require communication and continuous monitoring.

There are various approaches to change management and what works for one project or organization may not deliver the same results for the other. Change management is both an art and a science and no single approach will address all situations. The art is in understanding the target or impacted audience, organizational culture and selecting the appropriate approach. This project approach sets the groundwork for the organization to navigate change management. The extensive stakeholder engagement was a start of the process but moving to development and implementation requires additional considerations.

Some of the changes proposed here will impact current employees when they apply on future job openings. It is recommended that labour relations be consulted on how best to share and discuss recommendations and in particular expectations for internal applicants in the future.

Stakeholder involvement and input are key elements of any change effort. The Recruitment Team has been successful in the past at implementing significant change with the implementation of iCIMS. Many of the approaches used and lessons learned are valuable to selecting the appropriate process to use during implementation of these recommendations.

5.4 Impact and Benefit Realization

Based on the Municipal Program and Service Review conducted by Grant Thornton LLP, the recommendations pertaining to the recruitment process were categorized as potential process efficiency review or requiring further review.

The Grant Thornton LLP review identified the need to make the recruitment process more efficient so that frontline supervisor time could be redirected to service delivery. Creating process efficiency is consistent with the goals of the Ontario government Audit and Accountability Fund program that was established to help municipalities improve local service delivery and ensure taxpayers' dollars are being used efficiently. Once fully implemented, the recommendations outlined in this report will create efficiencies for HR Assistants and hiring supervisors. The majority of the recommendations will result in incremental and distributed time savings across the organization.

Any time savings for hiring supervisors will be redirected to service delivery. The actual impact of savings on a hiring supervisor's time is dependent on that individual's volume of recruitment within a given year. It is estimated that once the job specific screening questions are fully implemented, hiring supervisors for union and non-union competitions could save up to two hours per competition. This would roughly equate to about 1,082 hours of supervisory time diverted back to operations. In addition, expanded use of off-cycle posting for temporary CUPE positions, non-union positions and other eligible positions could reduce time to fill by three or more days. This would allow hiring supervisors to begin the recruitment process sooner and could reduce overtime costs associated with filling vacant shifts to ensure continuity of services to citizens.

Time savings for HR Assistants will be redirected to implementing the changes and improving services to hiring supervisors. Without implementation of the

recommendations and the anticipated efficiencies, an additional permanent HR Assistant would be required to maintain and meet future service demands.

The implementation of a new Recruitment Consultant position is essential to meeting the challenges of current and future labour markets. This role, through the development of sourcing strategies, will support hiring supervisors and shorten the time to fill for hard to fill positions. This would allow hiring supervisors to redirect their time to service delivery by minimizing the necessity to repost hard to fill positions.

An end-to-end recruitment system that is fully integrated with SAP and utilizing a properly configured position management module has the potential to reduce 0.5 or more of an HR Assistant's time. This estimate is based on reducing time associated with job posting preparation by hosting job descriptions in the system. A fully integrated system will eliminate manual data lookup, increase efficiency by generating offer letters directly from the system, and provide status updates to hiring supervisors directly through a dashboard. This would shift more support from administration functions to value-added recruiting consultant services. A fully integrated system would avoid additional HR staff costs that would be incurred to meet the organization's future needs.

Section Six: Summary

The Recruitment Process Improvement Project conducted an in-depth review of the recruitment, selection and hiring process. A number of improvement opportunities were identified that could be implemented within a year using the current iCIMS Applicant Tracking System.

The Corporate Digital Strategy recommends a comprehensive HR Process Management System that would address a number of needs and capabilities including applicant tracking and online recruitment. This work is dependent upon the SAP roadmap. The interim solutions recommended in this report are consistent with the direction of the Corporate Digital Strategy and the need to implement some interim solutions, specifically interim improvement to the recruitment process until the more comprehensive solution can be initiated starting in 2023.

The interim solutions recommended will provide improvements that would be beneficial for all stakeholders, significantly improving the candidate experience, and advancing the modernization of the recruitment process.

Appendix 1: List of Stakeholders and Municipal Benchmark

1. Karie Ortgiese, Director Human Resources & Corporate Safety
2. Lorraine MacPhail, Staffing, Development & Support Services
3. Bevin McIlwain, Coordinator Recruitment & Support Services
4. Cindy Howarth, Human Resources Assistant
5. Vicki Kuz, Human Resources Assistant
6. Karen Bonazzo Coordinator – Recruitment & Support Services
7. Carly Topozzini, Classification Analyst
8. Kaitlin Kopechanski, HR Analyst
9. Tonya Koski, Human Resources Assistant
10. Greg Hankkio, Fire Chief
11. Martin Hynna, Division Chief, Training Division Fire Services
12. Dana Earle, Deputy City Clerk
13. Andrew Dillon, Deputy Chief Superior North EMS
14. Marika Listenmaa Superintendent, Superior North EMS
15. Jackie Jacklitch, Community Services, Child Care
16. Kathleen Cannon, Director Revenue
17. Kayla Dixon, Director, Engineering & Operations
18. Michelle Warywoda, Director Environment
19. Leslie McEachern, Director Planning Services
20. Paul Pepe, Manager Tourism, CEDC
21. Eric Zakrewski, CEO Economic Development Commission
22. Jack Avella, Manager Corporate Information Technology
23. Terry O'Neill Manager Labour Relations
24. Anne Turuba, Manager Compensation & Benefits
25. Jason Sherband, Manager – Solid Waste and Recycling Services
26. Cameron Heroux, Supervisor Transit Services
27. Jesse Mikulinski, Supervisor Roads
28. Pat Berezowski, Supervisor Golf Operations
29. Adam Tempelman, Supervisor, WD/WWC Operations & Maintenance
30. John Pogue Supervisor, Landfill Operations
31. William Heinrich, Supervisor Traffic Control and Street Lighting
32. Ian Spoljarich, Supervisor Roads (South)
33. Tom Forsythe, Supervisor, Parks Operations (South)
34. Jeff Track - Supervisor Contract Services
35. Chrissie Dysiveck, Supervisor IT Service Desk
36. Jeannette Belluz, Supervisor Business Applications
37. Sean Malcolm, Supervisor Equipment - Transit
38. Heather Mihichuk, Program Manager Pioneer Ridge
39. Chris Borutski, Supervisor Utilities and Food Services Pioneer Ridge
40. Sheila Hansen, Director Nursing Services, Pioneer Ridge

41. Lee Mesic, Administrator, Pioneer Ridge
42. Joanne Screba, Supervisor Admin Support Services
43. Michelle Reimer, Supervisor, Central Support
44. Paul Burke, Supervisor Sports & Community Development
45. Sarah Smart, Program Supervisor – Children, Youth and Junior Inclusion Services
46. Nina Arcon, Program Supervisor – Children, Youth & Strategic Initiatives
47. Dana Vacek, CUPE
48. Rob Thibodeau, IBEW
49. Dennis Brescacin, Thunder Bay Professional Fire Fighters Association

External Consultations:
1. iCIMS demonstration
2. Ben Perry of Perry Consulting Group

Municipal Benchmark Contact Interviews
1. Ajax- Mary Lou Cosentino, Manager, HR Services
2. Brantford - Anita Szaloky Director of Human Resources
3. Chatham-Kent - Lucas Chambers Manager, Talent Acquisition and Development; Mackenzie King - Talent Acquisition and Development Officer
4. Guelph - Jeff Beaton Manager, Labour Relations and Customer Service
5. Halton Region - Daniela Verna, Acting Manager Talent Acquisition; Zehar Ovais - HRIS Coordinator;
6. Mississauga - Christine Gabany, Manager, Talent Acquisition; Alice Benningzubek Talent Acquisition Consultant
7. Oshawa- Sara Ingram, Manager, Talent and Organizational Development
8. Region of Peel - Judy McArthur Manager, Talent Acquisition
9. Sault Ste. Marie- Tiffany Fleming Recruitment & Training Coordinator; Human Resources; Brooke Campbell, HR Assistant
10. Whitby - Dana Johnston Senior Manager, HR Advisory Services
11. Windsor - Dan Iatonna, Manager Employment and Consulting Services

Appendix 2: Research Sources

Annual Surveys and White Papers
1. Talent Management Report, Conference Board of Canada
2. HR Technology Pulse Survey 2020
3. Transforming HR through Technology, SHRM
4. HR Technology Pulse Survey Gallagher 2020
5. Gartner Talent Acquisition Quarterly 2020
6. Your Approach to Hiring Is All Wrong - Outsourcing and algorithms won't get you the people you need. Peter Campbell Harvard Business (May–June 2019)
7. Talent Board North American Candidate Experience Research Report 2017
8. LinkedIn Talent Solutions Ultimate Recruiting Toolbox 2018
9. Corporate Human Resources Strategy- Three Year Plan: City of Edmonton,2007
10. Your Candidate Experience; Creating an Impact or Burning Cash, Deloitte 2017
11. Global Talent Trends, LinkedIn Talent Solutions 2019
12. Jobvite: Recruiting Benchmark Report 2018
13. Global Recruiting Trends 2018
14. RBC Economics: Will a return to pre-pandemic retirement and job quitting levels worsen emerging labour shortages in Canada? By Andrew Agopsowicz, July 2021
15. The Daily, Statistics Canada, September 2021
16. Northern Policy Institute, Briefing Note 9 Assessing Labour Market Shortages in the City of Thunder Bay, by Alex Ross March 2020

Web and other resources
1. Softwareadvice.com
2. SHRM.org
3. Conference Board of Canada
4. Capterra.ca
5. iCIMS video library on YouTube
6. Talent Board Jobvite Recruitment Benchmarking etc.

Appendix 3: Documents Reviewed

1. City Program and Service Review - Phase One, Grant Thornton LLP (December 2019)
2. City of Thunder Bay Program and Service Review – Phase Two, Grant Thornton LLP (June 2020)
3. Hiring Criteria Shortlisting Guide August-2020
4. Organization charts
5. Recruitment Grievances (2017-2020)
6. ATU Collective Agreement (2017-2020)
7. CUPE Collective Agreement (2015 - 2019)
8. IBEW Local 339 Collective Agreement (2016-2019)
9. ONA Collective Agreement (2018-2020)
10. TBPFFA Collective Agreement (2015-2017)
11. UFCW Collective Agreement (2017-2020)
12. UNIFOR Collective Agreement Jasper Place (2016-2019)
13. UNIFOR Collective Agreement Pioneer Ridge (2016-2019)
14. UNIFOR Collective Agreement SNEMS City (2015-2020)
15. UNIFOR Collective Agreement SNEMS District (2015-2020)
16. Hiring Process map
17. Job Advertising list
18. Outreach Agency List
19. Interviewing Guide August 2020
20. Recruitment-Selection-Hiring-Processes Manual
21. Reference Checking Guide August-2020
22. CUPE Hiring Checklists & Forms
23. Non - Affiliated Hiring Checklists & Forms
24. Non - Union Hiring Checklists & Forms
25. Union Except CUPE & UNIOR Hiring Checklists & Forms
26. CTB Supervisory Experience Definition - Aug 2016
27. CTB-Virtual-Interview-Guide-using-Microsoft-Teams
28. Note to File Form
29. Unsuccessful letter to candidate (April 2016)
30. Recruitment Selection Hiring - Training Outline (Orientation Session)
31. Corporate HR Procedures
32. Age Min Max HR-01-34
33. Validation of Credentials HR-01-35
34. Crossing Guard Hiring Process & Testing HR-01-58
35. Employment Contracts HR-01-55
36. 2020 Employment Equity Report R 77/202
37. Employment Equity HR-01-38
38. Firefighter Pre-Health Screening HR-01-60

Appendix 4: Proposed Timeline & Priority of Recommendations

Underway (U); Immediate (I) - next 6 months; Medium Term (M) - 6 to 12 months; Long Term (L)- year and beyond; Priority - Some recommendations that can be addressed the beginning and free up capacity to support the implementation of the remaining recommendations

Recommendation	U	I	M	L
A. Candidate Experience & Talent Attraction				
1. Simplify and Redesign the Job Posting		I		
2. Streamline Candidate Online Profile			M	
3. Continue Initiative to Expand Social Media Marketing and Sourcing	U	I		
4. (Priority) Establish Clear Expectations of Candidates		I	M	
5. Modernize the City of Thunder Bay Job Website			M	
6. Continue to Investigate iCIMS Job Alert Capability				L
B. Optimal Technology Recruitment Solution				
7. Comprehensive End to End Technology Solution Fully Integrated with AP				L
C. iCIMS Interim Solutions - Current Configuration & Underutilized System Capabilities				
8. Reconfigure iCIMS		I	M	
9. Investigate Hosting Job Descriptions in iCIMS			M	
10. Create Job Offers Directly from iCIMS			M	L
11. Integrated Digital Calendar Scheduling for Interviews		I	M	
12. Earlier Access to Candidate Applications			M	
13. iCIMS Superuser		I		
D. Interim Non-iCIMS Technology Solutions				
14. (Priority) Multiple User Spreadsheets Capability		I		
15. Expedite HR Access to Microsoft 365 Products			M	
16. Duplicate or Copy TB483 Functionality			M	

Recommendation				
17. (Priority) Implement Alternatives Approaches to Scheduling Meetings - Digital Assist Scheduling App		I	M	
18. (Priority) Linking Seniority to Candidate Listing	U	I		
E. Process & Procedure Related				
19. (Priority) Require one Formal Probationary Review		I		
20. (Priority) Maintain Nepotism Procedure but Eliminate Name Recognition		I		
21. Reference Check			M	
22. Satisfying Conditions of Employment		I	M	
23. Posting Flexibility Phased in as Capacity Become Available			M	L
24. Maintain Recent Improvements and Flexibility	U	I		
25. Bargaining Preparation			M	
26. Process Accountability		I	M	
27. Establish Recruitment Service Standards for Issuing Job Offers		I		
28. Establish Interview Questions Repository				L
F. Resourcing				
29. (Priority) Recruitment Consultant		I		
30. (Priority) Temporary HR Assistant		I		
31. Diversity, Equity and Inclusion Consultant (2023)				L
32. Resourcing Optimal Recruitment Solution				L

Appendix 5: Candidate Profile - City of Thunder Bay

* Basic Information

* Resume: Provide your general resume below to pre-fill your profile. Existing data in the form will be replaced. **If you update your resume the new information will be applied to all competitions you have previously applied on.**

My Computer	OneDrive	Google Drive	Dropbox

Create your profile:

Legal First Name	Legal Last Name	Email

*Login	*Password	*Password Re-enter
*Street Address	*City	*Postal Code

*Province	*Country	*Phone Number

* Mandatory Profile Questions:

Yes	NO	
•	•	*1. Are you legally eligible to work in Canada? (Being Canadian citizen, have a valid Permanent Resident status, or have a valid open work permit (work permit which does not have limitation on the type of work nor where you can work))
•	•	*2. Are you under 18 years of age?
•	•	*3. Are you a current employee?
•	•	*4. Employee Payroll number *_____

Acknowledgement*

- I certify that the information I have submitted as part of this employment application and included in my resume is complete and true.

Appendix 6: Sample Job Posting

Instructor - Aquatics   Part-Time

Competition Number REC-28-21   **Department** Community Services   **Posting Category** Open

Division Recreation & Culture   **Job Type** Part-Time   **Number of Positions** Several

Affiliation Non-Affiliated   **Site** Canada Games Complex   ⦿ CA-ON-Thunder Bay   **Min** CAD $15.71/Hr.

Max CAD $16.70/Hr.   **Pay Band** 3   **Closing Date** December 31, 2021

Apply Now and Be Considered Now

Job Description

POSITION SUMMARY: Under the general supervision of the Program Supervisor and the technical direction and guidance of the Senior Instructor, provides safe and enjoyable instruction to program participants.

MAJOR RESPONSIBILITIES:
1. Instructs program participants using core program and lesson plans for all classes.
2. Return any equipment to its proper location and maintain a clean pool site.
3. Supervises classes in a safe manner.
4. Participates in training and staff meetings as required.
5. Completes report forms relating to timesheets, accidents, unusual events, thefts, complaints and instructional programs.
6. Repairs equipment or takes appropriate action; advises supervisor of any equipment maintenance or replacement needs.
7. Ensures familiarity with emergency procedures of the facility.
8. Pre-tests students, prepares test sheets, and prepares for LSS Examiner, where applicable.
9. Performs such other related duties as may be assigned.

QUALIFICATIONS:
Education/Experience:
- Current certifications: CRCS/LSS Instructor, RLSSC Aquatic Emergency care or Standard First Aid and CPR Level C

Skills/Abilities:
- Must be customer service orientated and be able to get along with other members of the staff team
- Must demonstrate initiative and show a positive attitude

Assets:
- National Lifeguard

CONDITIONS OF EMPLOYMENT:
- Must maintain all awards current from date of application until end of employment period
- Must attend and complete within three months of employment, customer service training and WHMIS training
- Must undergo a successful Police Vulnerable Sector Check (PVSC)
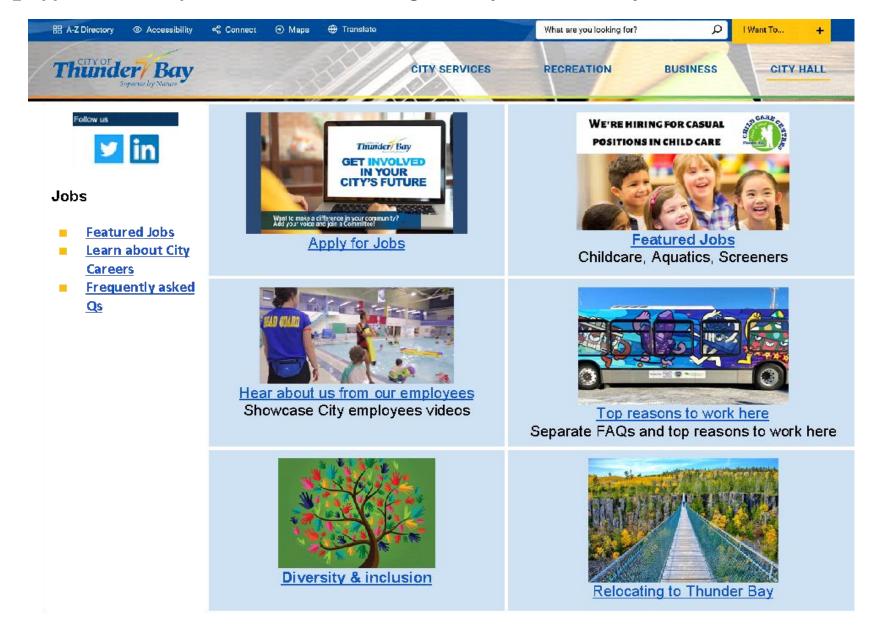- Will be required to work irregular hours and weekends

NOTE:
1. Application forms must reference the competition number and be submitted to Human Resources by 11:59 p.m. on the closing date
2. We would like to thank you for your interest in applying to City of Thunder Bay jobs. Please note only those applicants selected for an interview will be contacted.
3. The Corporation of the City of Thunder Bay is an Equal Opportunity Employer. The City of Thunder Bay encourages applications from Indigenous peoples, persons with disabilities, members of visible minority groups and women.
4. The City of Thunder Bay will provide reasonable accommodations upon request for all parts of the recruitment process.
5. Any collection of personal information is made under the authority of the Municipal Act, 2001. Personal information is collected in compliance with the Municipal Freedom of Information and Protection of Privacy Act.
    Personal information is collected for the purpose of recruiting candidates for employment opportunities with the City of Thunder Bay. None of your personal information will be shared, rented, sold or otherwise released to any third party without your consent.
    Any questions about this collection should be directed to: Supervisor – Staffing, Development & Support Services, Human Resources & Corporate Safety Division [T] 807-625-2585 [F] 807-625-3585 lorraine.macphail@thunderbay.ca
    Your personal information may be stored outside of Canada, but it will remain in North America. The City of Thunder Bay values your privacy and will ensure that reasonable measures are taken to safeguard your personal information

Appendix 7: Sample of A Potential Jobs Page for City of Thunder Bay

Memorandum

**Human Resources &
Corporate Safety**

Tel: (807) 625-2427
Fax: (807) 684-2186

Date:	December 3, 2021
To:	Dana Earle, Deputy City Clerk
From:	Karie Ortgiese, Director Human Resources & Corporate Safety
Subject:	**Recruitment Process Improvement Project**

We request the opportunity at the December 20, 2021, Committee of the Whole meeting to present the Recruitment Process Improvement Project associated with Report R 182/2021.

Jeff Macpherson, Director, J. Macpherson & Associates will be joining us to make the presentation.

Thank you

Corporate Report

DEPARTMENT/ DIVISION	Development & Emergency Services - Administration	***REPORT NO.***	R 181/2021
DATE PREPARED	11/26/2021	***FILE NO.***	
MEETING DATE	12/20/2021 (mm/dd/yyyy)		
SUBJECT	Strategy Development for Reducing Homelessness and Poverty in Our Community		

RECOMMENDATION

WITH RESPECT to Report R181/2021 (Development & Emergency Services – Community Strategies), we recommend the strategies outlined in this Report be approved;

AND THAT Administration review the Community Partnership Policy (05-06-02) and related procedures for changes that would be required for it to align well with other relevant capital grant sources and for it to support capital projects that address community safety, well-being, homelessness and poverty, with a focus on gaps identified in this report and report back Q2, 2022;

AND THAT Administration report back at Q2, 2022 with a source of financing to bring the uncommitted balance of the Community Partnership Reserve Fund to $1M;

AND THAT sustaining Community Partnership Reserve Fund contribution be included in the proposed 2023 budget;

AND THAT the Community, Youth & Cultural Funding Program (CYCFP) Funding Model and associated Community Stream funding criteria be revised to include the framework and priorities of the Community Safety & Well-being Plan for Projects, beginning with the October 2022 intake, and for Operating/Sustaining Grants, beginning with the June 2022 intake for 2023 funding;

AND THAT the general eligibility criteria, application and review processes of CYCFP be reviewed with the objective of increasing applications and success rate for organizations and projects related to community safety, well-being, homelessness and poverty, and Administration report back to Council for information or approvals as required;

AND THAT the Manager - Community Strategies, or designate, be included in the CYCFP Administrative and Grant Review Teams as the Funding Program Supervisor for the Community Stream;

AND THAT Administration make recommendations to Council in the annual Funding Program report in January 2022, should final 2022 funding recommendations justify an increase to Funding Program caps;

AND THAT City Council, through the Inter-Governmental Affairs Committee, endorse and support the advocacy requests made by the District of Thunder Bay Social Services Administration Board of Directors at the Association of Municipalities of Ontario (AMO) Conference 2021;

AND THAT Administration review the advocacy recommendations contained in the Thunder Bay Drug Strategy, Poverty Reduction Strategy, and Thunder Bay & Area Food Strategy and provide further recommendations to the Intergovernmental Affairs Committee;

AND THAT any necessary by-laws be presented to City Council for ratification.

LINK TO STRATEGIC PLAN

The City's Corporate Strategic Plan for 2019-2022 vision for Thunder Bay is One City, Growing Together. Thunder Bay will "foster an inclusive city" and "provide a high quality of life to our citizens." Under the Strategic Plan, community safety and well-being is a priority.

EXECUTIVE SUMMARY

This report is in response to a Council resolution on October 20, 2021, directing staff to report back with options for a multi-faceted approach to finance, leverage and influence solutions to address homelessness and poverty in Thunder Bay, and identifies some key gaps as it relates to homelessness prevention and poverty reduction.

This report outlines and recommends three broad strategies:

1. Strategy One - Leverage Outside Capital Investment through Community Partnership funding
2. Strategy Two – Enhance Operating and Project Funding through Community, Youth and Cultural Funding Program
3. Strategy Three – Focused Advocacy and Coordination

Further development and implementation of these strategies will be the subject of future reports to Council.

DISCUSSION

Homelessness describes the situation of an individual, family, or community without stable, safe, permanent, appropriate housing, or the immediate prospect, means and ability of acquiring it. It is the result of systemic or societal barriers, a lack of affordable and appropriate housing, the

Page **2**

individual or household's financial, mental, cognitive, behavioural or physical challenges, and/or racism and discrimination.

Poverty is defined as the condition of a person who is deprived of the resources, means, choices and power necessary to acquire and maintain a basic standard of living and to facilitate integration and participation in society. The World Health Organization calls poverty the single largest determinant of health.

Though this is complex and many entities are working concurrently, there is no single entity that has sole, holistic responsibility to address homelessness and poverty in Thunder Bay. It must be recognized that there are a significant number of organizations and community groups collaborating and providing resources for local responses to homelessness and poverty.

The City of Thunder Bay contributes to homelessness prevention and poverty reduction responses as a normal course of work through funding (annual levy to TBDSSAB; Community, Youth & Cultural Funding; Community Partnership Funding, Pro-Kids), through policy-based land sale discounts, and in-kind staff support. City Administration provides coordination support among multiple community partners working in the areas of housing, health, mental health, substance use, criminal justice, poverty reduction and food security. More detailed information, while not fully exhaustive, was provided to Council through a briefing note prepared by Community Strategies Manager C. Olsen for Committee of the Whole on October 18, 2021.

It is usual that City of Thunder Bay programs and services evolve to align with the Strategic Plan and other strategies and plans, which are a product of community need and input, as Council adopts them.

Effective January 1, 2019, the Police Services Act mandated municipalities to prepare and adopt community safety and well-being (CSWB) plans that proactively address locally identified priority risks. On June 28, 2021, Thunder Bay City Council approved the Thunder Bay CSWB Plan 2021-2025.

Developed in partnership with a multi-sectoral Steering Committee and through public and stakeholder consultation, the Plan identifies six local priorities for action to increase safety and well-being in Thunder Bay: Racism and Discrimination; **Housing**; Mental Health & Substance Misuse; Community Violence & Gender-based Violence; **Poverty Reduction & Financial Empowerment**; and, Supports for Children, Youth and Families. All of the priority areas are interconnected, and multi-faceted.

The Strategies recommended in this report do not change our scope of work, but provide a mechanism to strengthen and update our approaches to better support community partners' ability to address homelessness prevention and poverty reduction responses, as directed by Council.

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Identified Gaps

The City has, within its role, worked to minimize gaps by taking such actions as advocacy for a mental health and addictions crisis centre, providing support and funding for the Ontario Aboriginal Housing Services transitional housing project, establishing the Severe Weather Plan and providing a one-time grant for the PACE warming centre, for example.

The Canadian Observatory on Homelessness identifies three principle ways to address homelessness:

1. Prevention – preventing individuals from experiencing homelessness in the first place
2. Emergency Response – while someone is homeless, providing emergency supports such as shelter, food, and day programs
3. Housing, Accommodation, and Supports – moving people out of homelessness through the provision of housing and ongoing supports

As such, the following is a brief overview of some of the gaps that have been identified under each of the above categories that could potentially be addressed through the strategies outlined in this report.

Prevention

1. Lodge Gathering Place (recommendation from Not One More Death, supported by CTB's Anishinaabe Elders Council) for Indigenous community members to feel safe and welcomed, to access ceremony, conduct seasonal observances, and have community building and healing
2. Basic Income and/or living wage initiatives
3. Access to Technology (to connect to services, supports and employment opportunities)

Emergency Response

1. Low barrier shelter spaces (where abstinence is not required, and substance use could be permitted on-site)
2. Youth specific shelter (particularly for youth between 17-24)
3. Care Bus (connecting individuals experiencing homelessness and precarious housing with health, social, and housing supports)

Housing, Accommodation, and Supports

1. Transitional supportive housing (short- to medium-term housing with dedicated health and social supports)
2. Low-barrier housing (where abstinence is not required) for individuals chronically unsheltered

Additional gaps are, and will continue to be, determined through community partner collaboration on an ongoing basis.

COVID-19

Many successful initiatives were established over the last 20 months to address longstanding gaps, and were only possible because of one-time COVID-19 emergency funding available from various federal, provincial and municipal funding programs. Emergency funding expires at the end of March 2022 and there has been no commitment from governments for any additional funding beyond that time.

The following are quotes from community partners relative to the innovation and collaboration as a result of the additional funding available in the community:

"We solved homelessness for like 15 minutes through the collaboration and additional funding in our community." Community Partner

"This is the level of support required to meet the needs of the most vulnerable in our community." Community Partner

Strategy One – Leverage Outside Capital Investment

The objective of Strategy One is to leverage outside capital funding for local projects that address community safety and well-being, homelessness, poverty and related identified gaps.

Outside capital funding sources include those administered by the Ministry of Municipal Affairs and Housing, Ontario Trillium Foundation, Employment and Social Development Canada and Canada Mortgage and Housing Corporation. These grant programs typically require a project to be partially funded by other means, including grants obtained from other sources.

The above objective may be achieved by increasing funds available in the City's existing Community Partnership Reserve Fund and modifying related policy, administration and application process. A substantial increase to the Reserve Fund will be required as will an annual contribution plan to sustain funds available. This will impact the tax supported operating budget for 2023.

Community Partnership funding is currently accessible for major capital projects that meet certain objectives and criteria, but is not especially available to funding housing projects as the policy requires that projects be 'open and accessible to all residents'. The Community Partnership Fund is currently at an uncommitted balance of $110,000 and is typically funded by Council at a rate of $100,000 annually.

For developments involving City-owned land, Community Partnership grants may be combined with a discounted sale or lease cost under the City's Corporate Land-Related Financial Assistance Policy (Policy 09-04-65) which affords a 25% discount to a maximum value of $25,000. For example, the City recently awarded a combined funding of $245,000 to the $18M Ontario Aboriginal Housing Services transitional housing project, scheduled for construction in 2022-2023. This project is also to receive capital grant funding from other sources**.**

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The Tiny Homes initiative could be supported by the City similarly, and it is Administration's intention to advise the group to apply to the Community Partnership Program, as may be modified by Council.

With respect to Strategy One, it is recommended that:

1. Administration Report back to Council recommending amendments to the Community Partnership Policy (05-06-02) and related procedures to align well with other relevant capital grant sources and projects to improve community safety, well-being, homelessness and poverty.

2. Administration Report back to Council recommending a source of financing to bring the uncommitted balance of the Community Partnership Reserve Fund to $1M, or such greater or lesser amount that Council directs, as well as a financial plan to maintain the Reserve Fund at a balance of $1M, or such amount as directed by Council. Currently contemplated sources for initial seed funds are an anticipated 2021 favourable year end variance, Renew Thunder Bay Reserve Fund and the General Capital Reserve Fund.

3. Beginning 2023, the proposed tax supported operating budget include sustaining funding, currently estimated at $300,000.

Strategy Two – Enhance Operating and Project Funding

The objective of Strategy Two is to provide operating and project funding for local organizations and non-capital projects that align with the Community Safety & Well-Being Plan priority areas and outcomes, with a focus on homelessness, poverty and related identified gaps.

Funding is currently available for these purposes through the Community, Youth & Cultural Funding Program (CYCFP). Some relevant examples of current recipients include:

1. Shelter House
2. Regional Food Distribution Association
3. Lakehead Social Planning Council
4. Community Clothing Assistance
5. Roots to Harvest
6. Northwestern Ontario Women's Centre – Good Food Box

The 2021 approved budget for the CYCFP is $2,892,700. Funding is allocated in Sustaining, Operating and Project Grant categories for Community, Youth, and Cultural Organizations. Project Grants are also allocated to individual artists, and toward projects for Anti-racism and Reconciliation and Sport Development.

Grant recommendation guidelines require that Sustaining Grant recipients follow the corporation's annual budget directive, that all Operating Grants fall within an annual category cap of $195,000, and that all Project Grants fall within the annual category allocation of $47,600,

with each project grant not exceeding a maximum of $10,000. Recommendations in the Operating and Project categories have typically remained below the maximum allocations. Therefore, new applications meeting the objectives of Strategy Two could likely be accommodated within the typical budget for this program. Should funding applications and annual recommendations justify, Administration would recommend related increases to these annual cap amounts, at Council's option, in the annual funding program report to Council.

All streams and priority focus areas of the CYCFP, with the exception of the Community stream, currently link to and draw their specific funding criteria from related plans or strategies. The approval of the Community Safety & Well-Being Plan provides the opportunity to update and refine CYCFP Community Stream criteria, requirements and processes to reflect the framework and priorities of the CSWB Plan, with a goal of attracting new applications and increasing allocations to organizations and projects that align with the outcomes identified in the CSWB Plan.

With respect to Strategy Two, it is recommended that:

1. The CYCFP Funding Model and its associated Community Stream funding criteria be revised to include the framework and priorities of the Community Safety & Well-being Plan for Projects, beginning with the October 2022 intake, and for Operating/Sustaining Grants, beginning with the June 2022 intake for 2023 funding.

2. The Manager - Community Strategies, or designate, be included in the CYCFP Administrative and Grant Review Teams as the Funding Program Supervisor for the Community Stream.

3. The general eligibility criteria, application and review processes of CYCFP be reviewed with the objective of increasing applications and success rate for organizations and projects related to community safety, well-being, homelessness and poverty, and that Administration report back to Council for information or approvals as required.

4. Administration make recommendation to Council in the annual Funding Program report in January, 2022, should final 2022 funding recommendations justify an increase to Funding Program caps.

Strategy Three – Focused Advocacy & Coordination

The objective of Strategy Three is to direct resources toward advocacy for needed funding and systemic change to address homelessness and poverty, and provide continued coordination support for groups working to meet the needs of vulnerable individuals in the community.

The Inter-Governmental Affairs (IGA) Committee is established to strategically liaise with other orders of government and act as the primary vehicle for advocacy of municipal concerns such as local funding needs, service and systems gaps that are prohibitive to adequately addressing homeless and poverty. It has been through the Mayor and the IGA that the City has advocated for a mental health and addictions crisis centre.

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Further, the City has recently reorganized services and has created a Community Strategies Division within the Development & Emergency Services Department. The Division will provide leadership, technical expertise and coordination for inter-sectoral community-based initiatives to improve population health within the city, and will support City-community responses to ongoing and emerging social development needs.

The above objective may be achieved by dedicating IGA and Community Strategies' resources and efforts toward advocacy and continued coordination meant to address homelessness and poverty, with a focus on gaps identified in this report, and others that may be identified through further collaboration.

The Thunder Bay Drug Strategy, the Poverty Reduction Strategy, and Thunder Bay & Area Food Strategy, all Council endorsed plans, have identified key areas for advocacy related to responding to homelessness and poverty. As the Community Safety and Well-Being Advisory Committee develops its implementation plan, other areas for advocacy may arise.

Additionally, the TBDSSAB Board of Directors has advocated to provincial government officials for a number of initiatives and/or increased funding to address many of the gaps identified in this report:

1.   access to technology;
2.   increased funding for mental health and addiction support for housing tenants,
3.   funding for purpose-built supportive housing project(s),
4.   mental health and addictions agencies to be provided a long term commitment for support funding to build upon the positive results of the programs funded using the one-time mental health & addictions funding that was provided to the TBDSSAB to assist vulnerable populations;
5.   combine Home for Good and Community Homeless Prevention Initiative program, increase the allocation, and allow for capital projects to be funded; and,
6.   convene a provincial working group to address homelessness upon release from incarceration.

With respect to Strategy Three, it is recommended that:

1.   The City of Thunder Bay endorse and support the requests made by TBDSSAB at AMO Conference 2021.

2.   Administration review the advocacy recommendations contained in the Thunder Bay Drug Strategy, Poverty Reduction Strategy, and Thunder Bay & Area Food Strategy and provide IGA further options for advocacy.

CONSULTATION

Given the turnaround time for this Corporate Report, robust consultation with community partners and the general public was not conducted. In addition to the knowledge and expertise of

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the authors, the following individuals and documents were consulted to inform the content and recommendations contained in this Report:

1. General Manager – Corporate Services & Long-term Care & City Treasurer
2. General Manager – Community Services
3. Community Safety & Well-Being Plan, and CSWB Specialist
4. Building a Better Thunder Bay for All: A Community Action Plan to Reduce Poverty 2018-2020, and Poverty Reduction Strategy Coordinator
5. Building a Better Tomorrow: Thunder Bay Drug Strategy 2017-2021
6. Under One Roof: A Housing and Homelessness Plan 2014-2024
7. TBDSSAB's Briefing Package for Meetings with Ministers at AMO 2021 Conference
8. 2018 District of Thunder Bay Point-In-Time Count of People Experiencing Homelessness
9. Reaching Home: Thunder Bay Homelessness Plan 2019 – 2024

FINANCIAL IMPLICATION

There are no immediate financial implications associated with this report. The following financial implications will be brought forward in future reports:

1. a source of financing to bring the uncommitted balance of the Community Partnership Reserve Fund to $1M, or such amount determined by Council;
2. a financial plan to maintain the Community Partnership Reserve Fund at a balance of $1M, or such amount determined by Council, and the resulting operating budget impact;
3. recommendations to Council in the annual CYCFP report in January 2022, should final 2022 funding recommendations justify an increase to Funding Program caps.

CONCLUSION

It is concluded that Council should approve the Strategies contained in this report and the recommendations set out within it. It is further concluded that Administration will report back as outlined in this report.

BACKGROUND

At the October 25, 2021, Committee of the Whole meeting, a resolution was passed directing Administration to report back on or before December 20, 2021, with options for a multi-faceted approach to finance, leverage and influence solutions to address homelessness and poverty in Thunder Bay.

Further, the options were to include specific concepts/strategies for the municipality to act as a catalyst and facilitator to address:

1. identified gaps such as supportive transitional housing

2.   other gaps as may be identified through the municipality's community partners to significantly improve the lives of people experiencing homelessness, precarious housing, and poverty

As well, Administration was directed to report back on opportunities for Council to advocate, partner and work together with agencies, other orders of government and grass roots community groups to achieve positive outcomes.

REFERENCE MATERIAL ATTACHED:

None

PREPARED BY: Cynthia Olsen, Manager – Community Strategies and Joel DePeuter, Manager – Realty Services, Development & Emergency Services and Leah Prentice, Director – Recreation & Culture, Community Services

THIS REPORT SIGNED AND VERIFIED BY: (NAME OF GENERAL MANAGER) Joel DePeuter, Acting General Manager - Development and Emergency Services	DATE: Dec 10, 2021

Corporate Report

DEPARTMENT/ DIVISION	City Manager's Office - Office of the City Clerk	REPORT	R 184/2021
DATE PREPARED	12/01/2021	FILE	
MEETING DATE	12/20/2021 (mm/dd/yyyy)		
SUBJECT	2022 Amended Calendar of Meetings		

RECOMMENDATION

WITH RESPECT to Report R 184/2021 (City Manager's Office – Office of the City Clerk), we recommend that the 2022 Committee of the Whole, City Council and City Council – Special Session Meeting Calendar, as amended, be adopted;

AND THAT any necessary by-laws be presented to Council for ratification.

EXECUTIVE SUMMARY

The calendar of meetings for 2021 and 2022 was previously adopted through Report R 124/2020 (City Manager's Office – Office of the City Clerk). Amendments to the 2022 calendar are proposed in order to align with the final day of this term of Council – November 14, 2022.

DISCUSSION

The previously adopted calendar allowed for Council to return on November 8, 2022 with the final meeting of the 2018-2022 term scheduled on November 22, 2022. The *Municipal Elections Act* (MEA) was amended to update the dates for the 2018-2022 terms of municipal councils. Section 6 of the MEA now states that the term for the 2018-2022 City Council will end on November 14, 2022. In response to this change, Report 155/2021 (City Manager's Office – Office of the City Clerk) was approved by Council in November 2021 to appoint Acting Mayors, by by-law, for the updated period of December 1, 2021 until November 14, 2022.

The amended 2022 calendar of meetings is appended to this report as Attachment A. As outlined in Report 124/2020, the calendar continues to allow for breaks on weeks with statutory holidays and annual conferences where multiple Members of Council are in attendance. The calendar also provides for meetings to cease on September 19, 2022 for the 2022 Municipal Election and resume on November 14, 2022 for one final meeting of the current term.

The 2022-2026 City Council term will begin on November 15, 2022 with the Inauguration meeting scheduled for December 6, 2022.

FINANCIAL IMPLICATION

There are no financial implications associated with this report.

CONCLUSION

It is concluded that Council should adopt the amended 2022 Calendar of Meetings as appended to this report.

BACKGROUND

The calendar set out the regularly scheduled meetings of Committee of the Whole and City Council; identifying those weeks in which no Committee of the Whole or City Council meetings would be scheduled. In addition to the weeks in which a statutory holiday fell on a Monday, meetings were not scheduled.

Previous municipal elections in 2018, 2014, and 2010 provided for the cancellation of broadcasting of meetings of City Council from mid-September until the Inaugural meeting, this was in keeping with the Returning Officer's requirement for fairness within the Elections process. While this was a previously accepted practice, this does not provide for access to decisions and matters of public interest before City Council and impedes the right for residents to be engaged and participate in their local government process as it relates to decision making. City Council made the decision to cease meetings prior to the 2022 Municipal Election in Report 124/2020.

REFERENCE MATERIAL ATTACHED:

ATTACHMENT A – 2022 AMENDED CALENDAR OF MEETINGS

PREPARED BY: DANA EARLE, DEPUTY CITY CLERK

THIS REPORT SIGNED AND VERIFIED BY: (NAME OF GENERAL MANAGER)	DATE:
Norm Gale, City Manager	December 2, 2021

2022
COMMITTEE OF THE WHOLE/CITY COUNCIL MEETING CALENDAR

Committee of the Whole Sessions:		
O = Operations	COW	= Committee of the Whole - Special
CS = Community Services	PM	= City Council (Public Meeting)
PL = Planning	Council	= City Council
AD = Administrative Services	CC	= City Council – Special Session

JANUARY			FEBRUARY			MARCH		
Mon.	3	NO MEETING THIS WEEK	Mon.	7	O & CS Council	Mon.	7	O
Mon.	10	O & CS Council	Mon.	14	PM PL & AD	Mon.	14	CS Council
Mon.	17	PM PL	Mon.	21	Family Day NO MEETING THIS WEEK	Mon.	21	PM PL
Mon.	24	AD Council	Mon.	28	NO MEETING THIS WEEK	Mon.	28	AD Council
Mon.	31	NO MEETING THIS WEEK						

APRIL			MAY			JUNE		
Mon.	4	O & CS Council	Mon.	2	O	Mon.	6	O
Mon.	11	PM PL	Mon.	9	*CC – Hydro AGM* CS Council	Mon.	13	CS Council
Mon	18	Easter NO MEETING THIS WEEK	Mon.	16	PM PL & AD Council	Mon.	20	*CC- CEDC-AGM* PM PL
Tues.	19	COW ORC	Mon.	23	Victoria Day NO MEETING THIS WEEK	Mon.	27	AD Council
Mon.	25	*CC Tbaytel – AGM* AD Council	Mon.	30	NO MEETING THIS WEEK			

2022
COMMITTEE OF THE WHOLE/CITY COUNCIL MEETING CALENDAR

Committee of the Whole Sessions:

  O = Operations
  CS = Community Services
  PL = Planning
  AD = Administrative Services

COW   = Committee of the Whole - Special
PM   = City Council (Public Meeting)
Council = City Council
CC   = City Council – Special Session

JULY			AUGUST			SEPTEMBER		
Mon.	4	NO MEETING THIS WEEK	Mon.	1	Civic Holiday NO MEETING THIS WEEK	Mon.	5	Labour Day NO MEETING THIS WEEK
Mon.	11	NO MEETING THIS WEEK	Mon.	8	O & CS Council	Mon.	12	O & CS Council
Mon.	18	O & CS Council	Mon.	15	NO MEETING THIS WEEK	Mon.	19	**Meetings Cease until following the Municipal Election** NO MEETING THIS WEEK
Mon.	25	PM PL & AD Council	Mon.	22	PM PL & AD Council	Mon.	26	NO MEETING THIS WEEK
			Mon.	29	NO MEETING THIS WEEK			

OCTOBER			NOVEMBER			DECEMBER		
Mon.	3	NO MEETING THIS WEEK	Mon.	7	NO MEETING THIS WEEK	Mon.	5	**2022 City Council Inagural Meeting**
Mon.	10	Thanksgiving NO MEETING THIS WEEK	Mon.	14	**Last Meeting of 2018 COUNCIL** All sessions Council	Mon.	12	O & CS Council
Mon.	17	NO MEETING THIS WEEK	Mon.	21	NO MEETING THIS WEEK	Mon.	19	PM PL & AD Council
Mon.	24	NO MEETING THIS WEEK **ELECTION DAY**	Mon.	28	NO MEETING THIS WEEK	Mon.	26	NO MEETING THIS WEEK
Mon.	31	NO MEETING THIS WEEK						

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MEETING DATE	12/20/2021 (mm/dd/yyyy)

SUBJECT	Outstanding Item - Transition to Prudent Investor Standard and Investment Policy Statement

SUMMARY

Memorandum from Director - Financial Services Emma Westover dated December 12, 2021 recommending that the report back date for Outstanding Item 2021-108-ADM, Transition to Prudent Investor Standard and Investment Policy Statement to be changed from December 20, 2021 to January 24, 2022.

RECOMMENDATION

WITH RESPECT to the Memorandum from Director – Financial Services, Corporate Services & Long term Care Emma Westover dated December 9, 2021, we recommend that the report back date relating to Outstanding Item 2021-108-ADM – Transition to Prudent Investor Standard - Update be changed from December 20, 2021 to January 24, 2022.

ATTACHMENTS

1. Memo - E. Westover - Prudent Investor - Dec 9, 2021

MEMORANDUM

TO: Krista Power, City Clerk

FROM: Emma Westover, Director – Financial Services, Corporate Services &
            Long term Care

DATE: December 9, 2021

RE: Outstanding item: Transition to Prudent Investor Standard - Update

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At the July 26, 2021 Committee of the Whole meeting Report R 64/2021 (Corporate Services & Long Term Care - Financial Services) was presented, Council directed Administration to proceed with the adoption of the Prudent Investor Standard by working with ONE Investment on the steps necessary to join the ONE Joint Investment Board (ONE JIB) as a participating municipality and report back to Council with a new Investment Policy Statement (IPS), the ONE JIB agreement, and necessary by-laws by December 2021.

Administration is recommending the report back date relating to this outstanding item be revised from December 2021 to January 2022.

WITH RESPECT to the Memorandum from Director – Financial Services, Corporate Services & Long term Care Emma Westover dated December 9, 2021, we recommend that the report back date relating to Outstanding Item 2021-108-ADM – Transition to Prudent Investor Standard - Update be changed from December 20, 2021 to January 24, 2022.

Thank you,

cc:

  Norm Gale, City Manager
  Executive Management Team
  Krista Power, City Clerk

MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Thank you from Emergency Management Ontario

SUMMARY

Memorandum from City Manager Norm Gale dated December 9, 2021 relative to the above noted, for information.

ATTACHMENTS

1. Memo - Dec 9, 2021 - N. Gale - EMO Correspondence
2. EMO - Dec 3, 2021 - Thank you - wildland fire season

Memorandum

TO: Krista Power, City Clerk

FROM: Norm Gale, City Manager

DATE: December 9, 2021

SUBJECT: Thank you from Emergency Management Ontario
                Committee of the Whole – December 20, 2021

Attached please find a letter received from Emergency Management Ontario in recognition of the City of Thunder Bay's support and assistance to First Nation communities during the 2021 wildland fire season.

Ministry of the Solicitor General

Ministère du Solliciteur général

Ontario ⬤

Office of the
Fire Marshal and
Emergency Management

25 Morton Shulman Avenue
Toronto ON M3M 0B1
Tel: 647-329-1200

Bureau du
commissaire des incendies et
de la gestion des situations d'urgence

25, rue Morton Shulman
Toronto ON M7A 1Y6
Tél.: 647-329-1200

December 3, 2021

Norm Gale
City Manager
City of Thunder Bay
City Hall, 2nd floor 500 Donald St. E.
Thunder Bay, ON
P7E 5V3

Email: ngale@thunderbay.ca

Dear Norm Gale:

On behalf of Emergency Management Ontario (EMO), I would like to express our sincere gratitude and appreciation for the support and assistance that was provided by your organization to the First Nation communities that were evacuated due to the threats of wildland fires this summer.

Being evacuated from one's home, with very little warning, to an unfamiliar place can be extremely stressful. One can only imagine how this was further exacerbated in light of the COVID-19 pandemic. The support provided by our partners helped ensure these residents were safe, comfortable, and had the necessary resources to help alleviate some of that stress.

This year proved to be one of the most challenging wildland fire seasons on record, with approximately 1,200 fires across Northern Ontario burning 793,325 hectares of land and setting a new record in Ontario since 1960. The threat of these fires resulted in the evacuation of over 3,700 community members from six First Nation communities to both northern and southern Ontario locations and 15 emergency declarations; eight of which were impacted communities and seven host communities.

With October 31st marking the end of the 2021 wildland fire season, I am pleased to report that through the effective collaboration of those involved all evacuations, hosting and the safe return of evacuees took place without a single case of COVID-19 as a result of this process.

Successfully coordinating evacuations of this scale is truly a team effort and we are thankful for the compassion and support provided by you and your colleagues to the people of Ontario.

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As we review the successes and challenges of the last few months to improve planning for the 2022 Flood and Wildland fire season, we hope to count on your continued support. The EMO team will follow-up with your organizations early in 2022.

Wishing you a safe and happy holiday season and all the best in the new year.

Sincerely,

Teepu Khawja
Chief, Emergency Management Ontario
Assistant Deputy Minister, Ministry of the Solicitor General

CC: cemc@thunderbay.ca

MEETING DATE   12/20/2021 (mm/dd/yyyy)

SUBJECT   Outstanding List for Administrative Services as at December 6, 2021

SUMMARY

Memorandum from City Clerk Krista Power, dated December 6, 2021 providing the Administrative Services Outstanding Items List, for information.

ATTACHMENTS

1. Memo - K. Power - Dec 6, 2021 - Outstanding List

Memorandum

TO: Mayor & Council

FROM: Krista Power, City Clerk

DATE: December 6, 2021

SUBJECT: Outstanding List for Administrative Services Session as of December 6, 2021
Committee of the Whole – December 20, 2021

The following items are on the outstanding list for Administrative Services:

Meeting Session	Reference Number (yyyy-nnn-MTG)	Department/Division	Outstanding Item Subject	Resolution Report Back Date	Revised Report Back Date (Memos presented at COW updating or delaying Item)
Administrative Services	2009-028-ADM	Corporate Services & Long Term Care / Financial Services	Landfill Gas Generation Project	Apr-12	Mar-28-2022
Administrative Services	2018-009-ADM	City Manager's Office / Corporate Strategic Services	Clean, Green and Beautiful Policy Review	No date included in resolution	Apr-25-2022
Administrative Services	2020-049-ADM	City Manager's Office / Office of the City Clerk	Committee Meals	Report back when 75% of Committees are meeting in person	
Administrative Services	2021-104-ADM	City Manager's Office / Human Resources & Corporate Safety	Work Life Initiatives - Policy	Jun-27-2022	
Administrative Services	2021-108-ADM	Corporate Services & Long Term Care/Financial Services	2020 Update on Investment of Municipal Funds and Prudent Investor Standard for Municipal Investments	Dec-20-2021	