



Revitalizing IT to Meet the New CAO's Ambitious Digital Vision

MISA Ontario 2018



**Perry Group
Consulting** Ltd.

A photograph of the Town of Whitby building, a modern structure with brick and large glass windows, situated behind a green lawn. To the left, several flagpoles hold the Canadian flag, the Ontario flag, and the rainbow flag. The sky is clear and blue.

Town of Whitby

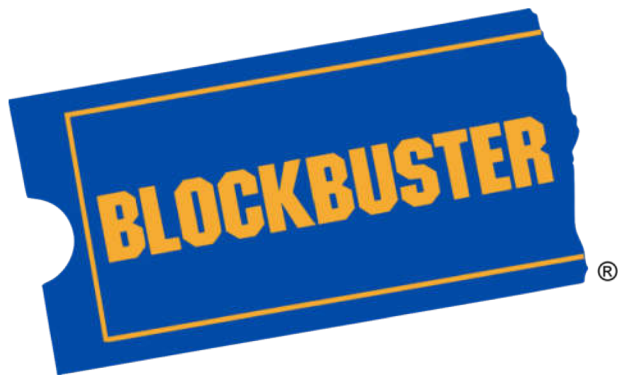
- Lakefront community located in the heart of Durham Region
- 20th largest Ontario Municipality
- Massive population growth expected in next 8 years (+80K)



Motivation

Project Motivation

- Corporation was without a Corporate IT Strategic Plan for 10+ years
- No means to prioritize projects, changing of priorities
- No KPIs established
- Resources running at over capacity



government for a



citizenry

Project Considerations

- New CAO with an ambitious Digital Vision
- Significant changes on Leadership Team
- Council's desire to provide additional online services
- Corporation has asked all departments to do more with existing funding levels

The Actual Situation

- IT was positioned as a reactive backroom service
- Infrastructure and Business solutions had fallen significantly behind
- No Corporate vision, framework, policies or governance for making technology investment decisions
- Departments making technology decisions and investments without involving IT services team
- IT Staff who were working hard but not meeting corporate expectations



Significant gap between CAO & Council's vision and the real situation



Approach

Pre-Project Steps

1

Preparation

- Complete high level assessment
- Get involved in Corporate Initiatives
- Think about your project “pitch”
- Determine appropriate timing to push initiative ahead

2

Expectation

- What are your outcomes & expectations
- Think about and prepare for project impacts on your team, processes and technology decisions
- Determine project scope

3

Commitment

- Garner support from Leadership team
- Leveraged findings from other Corporate initiatives (SDR)
- Re-use strategic phrases from CAO (Frankenstein technology)
- Start selling benefits of this project

4

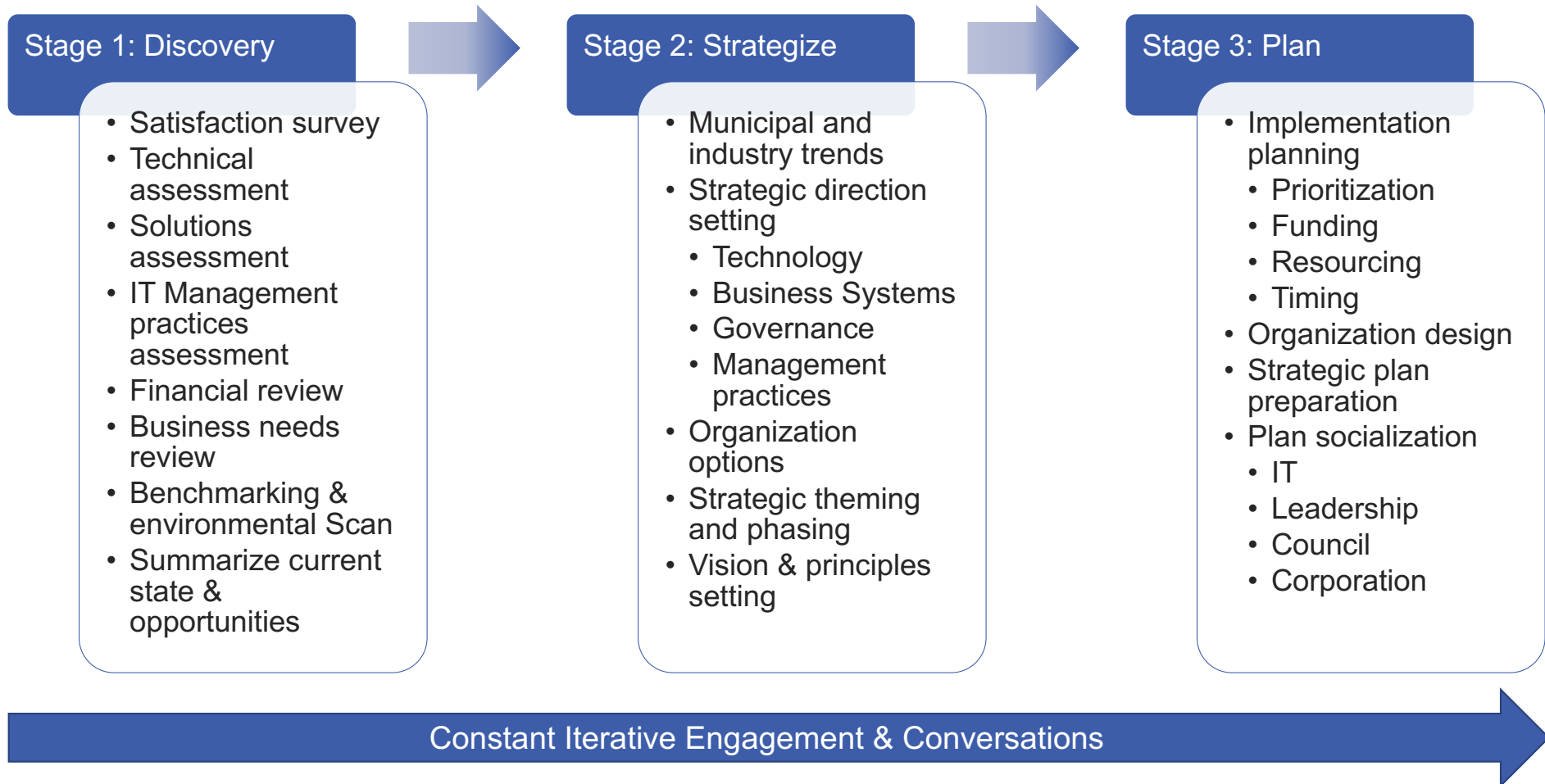
Research

- Determine staff capacity
- Identify skills / capacity gaps
- Research IT strategic plans from your municipal peers

5

Engagement

- Complete RFP process
- Involve key stakeholders in evaluation of RFP

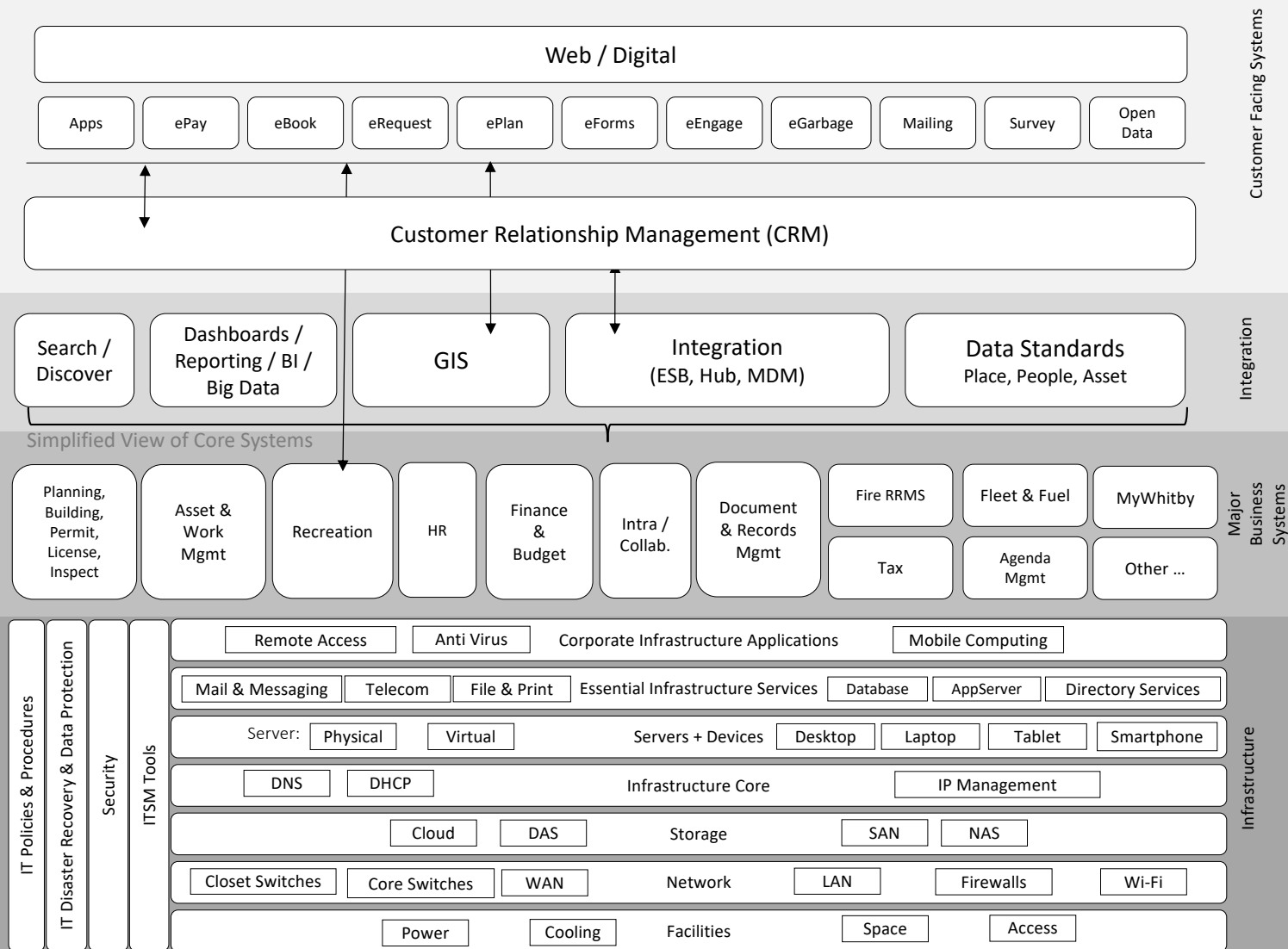


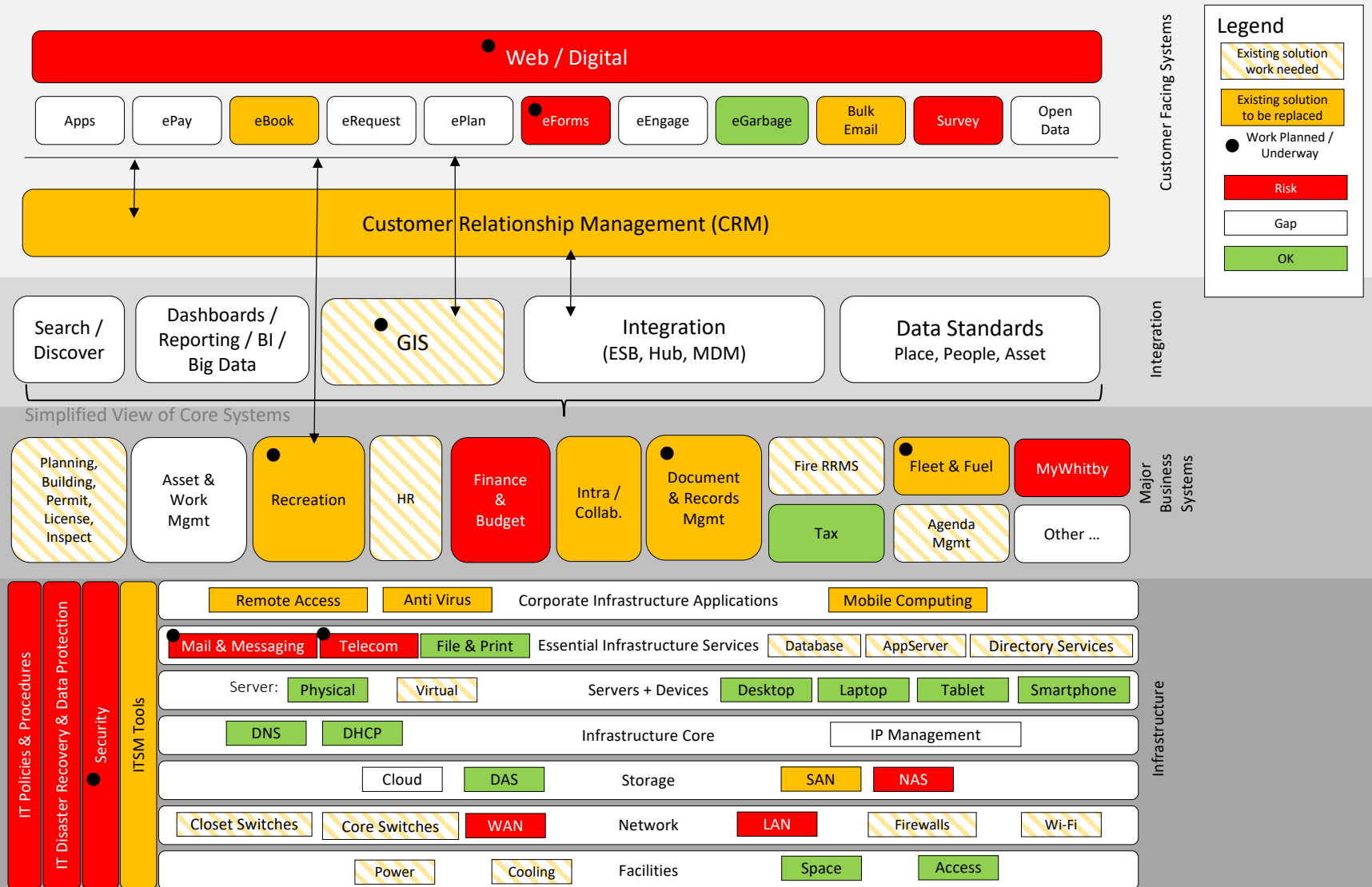
4. Customer Facing Layer
(Web, Social, eServices, Chat, Apps)

3. Integration Layer
(GIS, Integration Hub, Data Standards, BI)

2. Business Solutions Layer
(ERP, PRM, WMS, CRM, ECM, etc.)

1. Technology Infrastructure Layer
(Facilities, Network, Server, Storage, Devices,
Collaboration Tools, Security, DR)





Governance

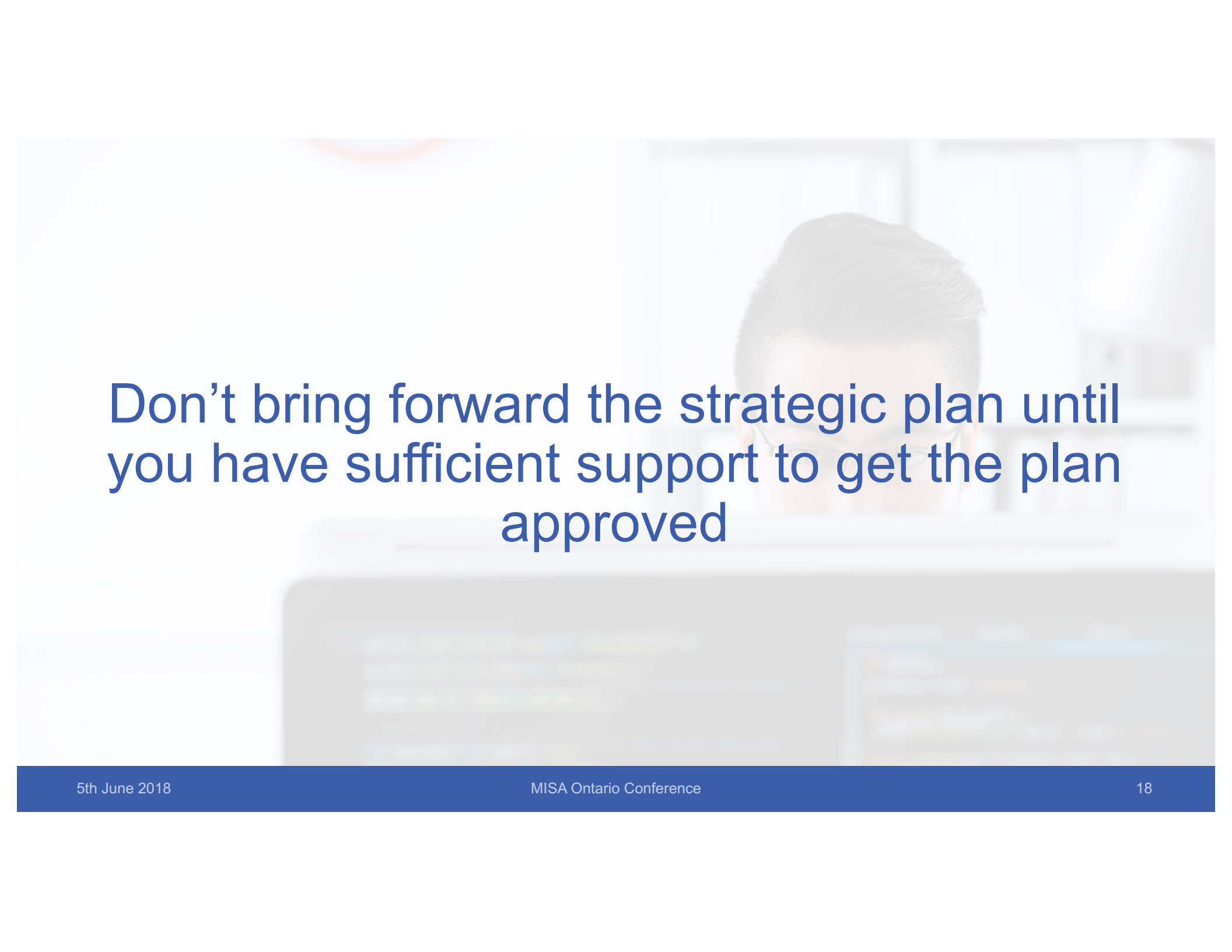
Typical Structures and Processes	Well Managed	Present at Whitby?
Executive IT Steering Committee	✓	X
Clear and consistent IT investment process, including project prioritization	✓	X
Project portfolio management	✓	X
Consistent / repeatable project delivery process	✓	X
Corporate IT policies	✓	X
Corporate IT standards	✓	X



Council Engagement

Should we engage council? How should we engage?

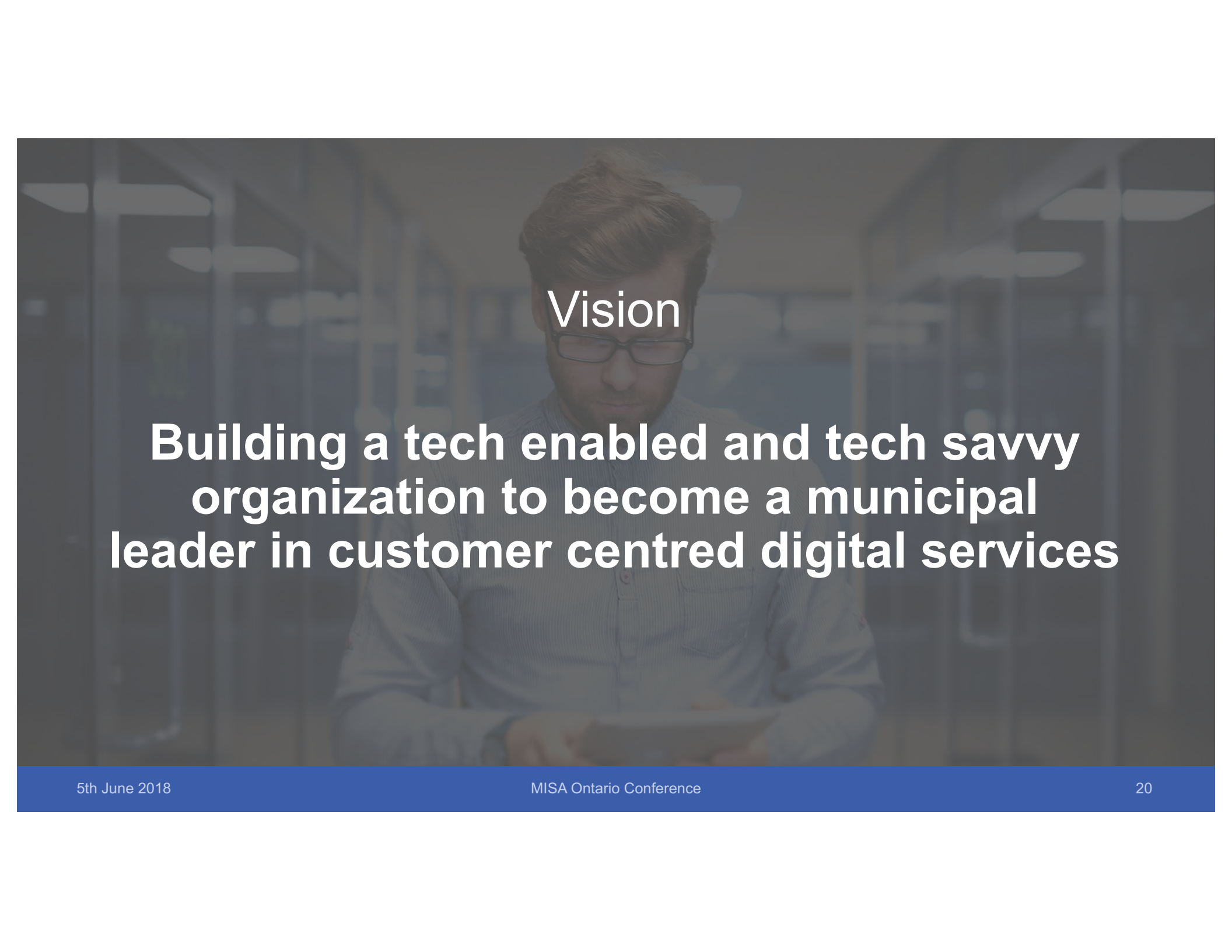
1. **Consultant Interviews 1 on 1 with Councillors**
 - Experience, understanding of current state, what are they looking for
2. **Education session – when strategy drafted but not final**
 - Shared strategic directions. Allowed for questions, feedback and input
3. **Strategy approval – March 2018**
 - Approved strategy
 - Use budget to set funding and resourcing



Don't bring forward the strategic plan until
you have sufficient support to get the plan
approved



The Plan

A man with glasses and a light blue shirt is looking down at a tablet device. He is in a modern office environment with glass partitions and other people in the background. The image is slightly blurred and has a dark overlay.

Vision

Building a tech enabled and tech savvy organization to become a municipal leader in customer centred digital services

Principles

- Adopt a corporately coordinated approach that puts Corporate initiatives first
- Do IT Projects the right way: Strategize, Plan and then Execute
- Design business processes first – with the goal of avoiding the *Whitby Way*
- Prioritize User Experience (UX)
- Utilize current and emerging modern computing paradigms, Mobile, Cloud, Social, Collaboration, Web based, device agnostic, integration capable solutions
- Evolve into a data driven organization, where data is considered a Corporate Asset
- Be fiscally responsible in the implementation of technology (TCO, ROI)
- Be secure while balancing risk and usability
- Be Open by Default

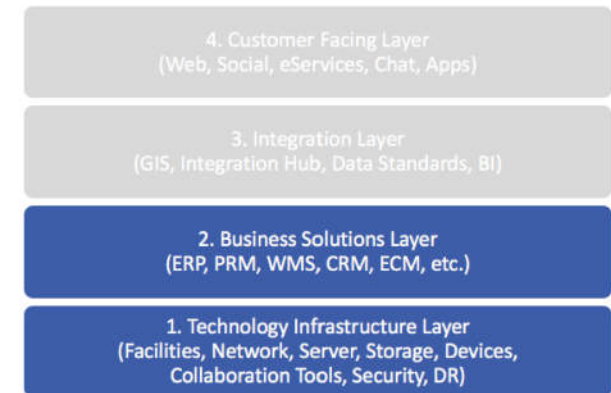
1. Build Conditions for Success

for a technology program

- CAO chaired executive steering committee – “T3”
- Processes – prioritization, project management, portfolio KPI's
- Elevate IT function – Rebrand IT, IT Manager → CIO, Supervisors to Managers
- Increase resourcing – New Supervisors, Business Analysts, contract funding for projects, increased use of managed service partnerships
- Business partnership based on regular IT-business service reviews

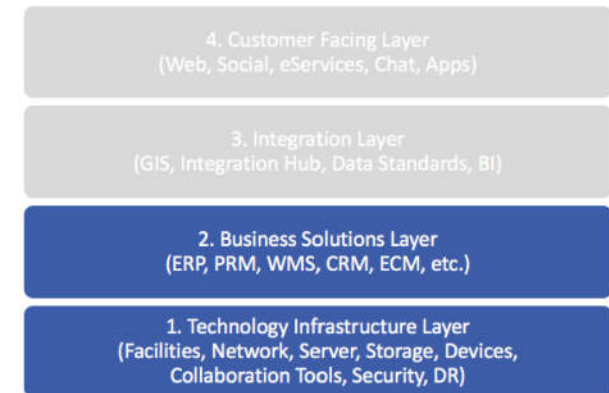
2. Revamp Technology Foundations

- Application Delivery replacement
- Network upgrades and enhancements
- Telephone system replacement
- Town hall renovation – including data centre improvements
- IT security – managed services
- Business continuity and IT service continuity planning



3. Business Solutions

- New ERP (Finance and HR processes)
- Amanda enhancements (including mobile and online services)
- New Work and Asset Management system (including mobile)
- CRM system
- ECM / collaboration system
- + some smaller, immediate initiatives in Customer Facing layer





Deliverables

What's Happened Since?

- **Organizational changes**
 - Renaming of IT division to Technology and Innovations Services
 - Title changes approval (CIO from Manager, Manager from Supervisor)
 - Council approval for two additional supervisors (Manager of Client Services and Manager of Innovation and Projects)
- **Infrastructure changes**
 - Upgrade of SAN Capacity
 - Creation of new vmware environments (which includes new servers)
 - New Core Switch
- **Business Solution changes**
 - New Intranet
 - New Learning Management Solution
 - New applicant tracking solution

What's is underway

- **Organizational changes**
 - Transformational planning to restructure TIS into 4 sections
 - Rewriting job descriptions for all TIS roles
 - Establishment of T3 Governance Committee + Run, Grow, Transform Portfolio
- **Infrastructure Projects**
 - Ongoing modernization of client computing devices
 - Wiring enhancements at various facilities
 - Fibre expansion to new town facilities
- **Business Solution project**
 - Implementation of new Fleet Solution
 - RFP for new AVL solution
 - Pilot for new ECM



Lessons Learned

We think you should know



The success of a Corporate IT Strategic plan revolves around people

Lessons Learned: Dan

1. Prepare yourself and your team for the journey ahead
2. Engage internal / external peers prior to start
3. Think in advance how you plan to use the strategic plan findings and recommendations (toothpaste analogy)
4. Don't assume that anyone within the corporation fully understands the state of the current technology infrastructure and related challenges
5. Plan how you will address the People element of this process (it is why People is listed first in the People – Process – Technology model)

Lessons Learned: Dan

6. Get some experience with strategic planning before starting a project of this complexity
7. Budget sufficient funds to allow for deeper investigation, workshops and staff training
8. Set and communicate clear expectations of what the strategic plan will do / not do
9. Be prepared to level set expectations of staff, senior leadership and Council periodically
10. Don't rush the process - the journey is valuable for all involved

Lessons Learned: Ben

1. Executive (CAO and Commissioner / GM level) engagement and support during IT strategy development and after is essential
2. Be honest about the real situation – don't under-sell the problems and challenges
3. Paint the picture of where the org wants to go – use stories to explain how technology will help
4. Emphasis importance of departmental leadership and management role in leading change



Questions?

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