

Information Report - IT Strategic Plan (Progress Update)

Purpose

The purpose of this report and the associated presentation is to inform the Committee of: 1. the status of the project to create the IT Strategic Plan; 2. the key findings and strategies developed so far; and 3. the next steps.

The purpose is also to listen to Committee feedback.

Background

CGS issued a Request for Proposal (RFP) on July 21, 2017 to replace its previous IT Strategic Plan dated June 2007.

One of the key principles in organizational restructuring that took place in early 2017 was a desire on the part of ELT to raise the profile of IT as having a strategic leadership role in the future of service to citizens and efficient management of CGS's services.

As a result of the RFP, Perry Group Consulting Ltd., which has extensive experience developing successful municipal IT strategies, was contracted. Additionally a Project Team made up of City staff from across various divisions and across various levels is supporting this project.

Overview / Executive Summary

The City of Greater Sudbury (CGS) is currently working on a modernized IT Strategic Plan. So far key components of this plan have been developed including an assessment of the current state of technology at CGS and guiding strategies. Although, this project is still underway, there is a lot of good material to share at this time and a presentation now is an opportunity to listen to feedback.

As a summary of the status of this project, it has three (3) phases: Discovery; Strategize and Plan. It has completed the Discovery phase, it is nearing completion of the Strategize phase and it is now starting the Plan phase. All phases are scheduled for final presentation back to the Finance and Administration Committee in June 2018.

The Discovery phase employed three (3) main methods to assess current state of Technology at CGS; first a survey of staff, second an assessment of CGS versus a model of generally required municipal technologies, third an assessment of CGS versus a model of generally required technology management processes.

- For the survey 580 CGS staff responded. Key messages were: 1. good satisfaction with basic technology components like phones and laptops; 2. lower satisfaction with the business solutions that help them service CGS 'Customers'; 3. a need to train staff in the new technology.
- For the assessment of CGS technologies key findings were: 1. we are missing technology tools that could improve business such as Land Property

Management System, and Electronic Records Management; 2. we have major systems that need replacing including our Customer Relationship Management system; 3. we could better use enabling systems we already have such as our Enterprise Resource Planning (ERP) (see definition below).

To arrive at this assessment, our systems were compared to the Municipal Technology Architecture (MTA) (see definition below). This method provided a concise one page visualization of areas for improvement and gaps across all major CGS systems.

- The assessment of IT Management Practices found: 1. we are missing cross-CGS IT governance that enables business units to direct and leverage technology for City Customers and the leaders in the organization to make sound choices about future IT investments; 2. we invest significantly less in technology as compared to peer municipalities; 3. we need to modernize IT roles and processes to execute projects more effectively.

The subsequent Strategize phase involved facilitated workshops to address the gaps found during the Discovery phase; it resulted in three (3) categories of recommendations:

- First, strategic statements were recommended to guide IT direction. Key among them is a technology vision and the principles to guide priorities. (A draft vision statement and list of guiding principles are included here for discussion. These will be finalized by ELT with input from the IT Strategic Plan Project Team.)
 - Vision

Leader in customer centered digitally enabled service delivery, openness and data driven decision making.
 - Principles
 1. The City's customers are the user of the service; these customers should be actively involved in the design of solutions
 2. Services are demonstrably better as a result of technology investments. Always focus on business transformation, especially change management
 3. Use architecture and standards to drive decision making
 4. Use existing enterprise systems when they meet at least 80% of the business needs
 5. Data is a corporate asset
 6. The technology we provide to staff reflects our expectation to be an employer of choice
 7. We use a transparent, enterprise-wide perspective to define technology priorities and rationalize technology investments
 8. We support technology investments with key indicators that show the value earned from the investment, both in the short and long terms
 9. Success comes from partnership and collaboration both amongst internal departments and with external partners
 10. We emphasize timely results, delivered with nimbleness, but with appropriate project oversight

- Second, a governance model is recommended that defines responsibilities and processes to optimize technology planning decisions and to continuously monitor technology delivery progress.
- Third, a set of recommendations related to internal management processes and the development of required skills.

As a part of this process the IT Strategic Plan Project Team recognized the need to link the enterprise-wide governance approach being taken by the IT Strategic Plan with steps underway to develop an enterprise Geographical Information System (GIS) strategy. This linking ensures that CGS optimally delivers integrated GIS and technology solutions.

In conclusion, the project has completed the assessment of the current state of Technology and used this to facilitate the creation of recommended strategies. Work continues to complete a modernized IT Strategic Plan that can be presented in June.

Next Steps

- Present the completed IT Strategic Plan to Finance and Administration Committee on June 19, 2018

Definitions

Enterprise Geographical Information System (GIS): a system that is integrated through the entire organization so that all users can manage, share, and use spatial data and related information to address a variety of needs, including data creation, modification, visualization and analysis.

Enterprise Resource Planning (ERP) system: the suite of systems managing information like, employee payroll, financial transactions and information about assets.

Municipal Technology Architecture (MTA): a model that presents a four layer diagram that defines categories of systems that municipalities require, listed here in order from top to bottom: Customer Facing Systems; Integration; Major Business Systems; and Infrastructure. Within each of these categories there is a further set of generally required municipal technology components. As an explanation of these categories:

- Customer Facing Systems – include things like Apps that City Customers would use on their smartphone, or access to information on City websites.
- Integration – is a category of technology that collects information, enables information to be shared between information systems and enables data analysis and data based decision making.
- Major Business Systems – are information system building blocks used to do key functions of the City; often these systems now include modules that offer Customer Facing Systems interfaces as well.
- Infrastructure – is the base technology that the layers above need to work such as secure networks. Actually, each of the categories above relies on those below it.