Georgian Bay Modernization of Electronic / **Online Services**

Final Report

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1.0 Executive Summary

The Township of Georgian Bay (the "Township"), like many other municipalities, faced unprecedented challenges and change when COVID shut down Township offices and reduced or eliminated face-to-face interactions with citizens. Municipalities were forced to conduct business online, with many staff working remotely. Technology was pushed to the forefront and quick actions were needed to ensure everyone who was required to work from home was provided a laptop and the ability to effectively work remotely.

Technology is more important now than ever before as in-person interactions change to an online service model. However, in reviewing the Township's current environment, it appears that there are still many processes that have not been digitized and that remain predominantly manual. There are many others where processes and systems are siloed or have become outdated and are now inhibiting the Township's effectiveness.

Because of the siloed systems and dated processes, the Township is unable to offer end-to-end digital services that make it easy for customers to interact and transact with the Township. Instead, in most cases, customers must come to Town Hall, with paper forms filled or with copies of plans to submit an application or make a request. This does not reflect modern customer expectations, nor is this an efficient way for the Township to deliver services.

Put simply, the Township's technology environment is not enabling efficient business practices or modernized service delivery. In particular, the core foundational processes and solutions – Financial, HR, Work and Asset Management, Land and Property Management – are in need of modernization.

Technology should enable a modern municipality to transact (pay, book, apply, request) with its citizens online 24x7, using their smartphones or tablets. It should support and enable increased engagement with citizens. It should help processes be more efficient, reducing the amount of time staff spend processing paperwork and, instead, allowing staff to spend more time working on more value-added activities.

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

Through the development of this Modernization Report, the Township's leadership team has established a vision for the future that focuses on delivering customer-centred digital services. This is a profound change that is not just about technology. It is about transforming the way the Township does business and delivers service, and a culture change in the way that the organization comes together to tackle technology-enabled business initiatives.

First, the Township must focus on the customer experience and build the conditions necessary to manage and coordinate the technology program associated with the modernization of services. Following are the key recommendations to modernize the Township.

People – Hiring a new IT resource, a Business System Specialist. that will help build stronger business relationships between IT and the Township's business units and will help translate ideas into realistic and achievable projects.

Process – Efforts should be focused on updating policies and procedures to improve the rigour by which technology ideas are conceptualized, planned, funded and executed.

Technology – Improving corporate coordination and planning around technology by purchasing an Enterprise Resource Planning (ERP) solution that will allow information to be shared between all components of the organization.

Financial and Resource Commitment is Critical

The strategy identifies capital requirements of over $250K for the three years and operating expenditures will also be expected to increase by approximately the same amount in that time frame.

While it is acknowledged that this represents significant investment, there is a clear need for change. It is evident that the current technology environment is inhibiting effective government and not meeting customer service expectations.

The Township's investments in the short- and long-term technology recommendations in this strategy, will deliver tools and capabilities for optimizing service delivery and improving productivity and will create the foundations to radically improve the way that citizens interact with the Township ultimately providing faster turnaround and reducing paper use and visits to Town Hall.

Implementing the recommendations will provide the foundations that are necessary to position the Township to be able to deliver customer-centred digital services.

2.0 Introduction

2.1. Importance of Technology to Municipalities

Municipalities are faced with significant challenges to stretch resources to deliver high quality customer service that meets the expectations of the modern citizen, to manage and sustain new and aging assets in effectively engaging citizens in decisions related to the building of the community.

The Township of Georgian Bay has a unique population as its seasonal population increases to over 16,000 in the summer, bringing about big city expectations to the municipality. The Township will face several specific pressures as it embarks on a modernization strategy to meet the community needs and requirements.

2.2. Pressure on Core Services

All departments are reliant on core corporate services – HR, Finance, IT, Communications – but HR and Financial processes in particular, are critical business processes in discharging their responsibilities.

Many manual processes inhibit the Township department's ability to move at the speed they need, while balancing corporate controls. These core services, used by all Township departments, must be efficient, effective and operate in real-time if the Township is to be effective.

Increasingly, municipalities across the world and here in Ontario are turning to technology as a means of addressing these challenges and seeing results.

- Delivering customer service that meets expectations
    - With further restrictions from COVID-19, there is a need to ensure that customers can transact with the Township through online services. Moreover, seasonal residents are now extending their visits to their secondary homes, and this puts pressure on the municipality to be able to offer services year-round, when in the past this was not the case. This means the Township has to change the way it is delivering service. This is further compounded by seasonal residents that come from larger cities, where online services are part of their day to day routine.
- Stretching scarce resources
    - Resources are scarce in municipalities, as is funding. It has been proven that municipalities that utilize integrated systems, rather than manually keying in data, are able to utilize staff more efficiently to work on more value-added activities. The value of integrating systems is that there is "one version of the truth". In other words, there is only one place data is entered and the system does the linkages between programs. Having good data is valuable to any organization, especially municipalities that manage over many lines of business.

- Doing more with less
    - Enabling mobility is a valuable step in moving towards modernization. By deploying, for example, mobile building inspections software and enabling online inspection booking, the Township would see increased productivity of inspectors. Other municipalities have seen cost savings each year by enabling mobility in areas such as Building, Fire and Asset Management. Organizations that have implemented work management systems, with mobile capabilities have seen a significant increase in productivity, in some cases seeing crews resolving up to 60% more work orders through supporting technologies.
- Using data to optimize services
    - Municipalities are seeing savings using route optimizing technologies used by UPS and FedEx to optimize patrols, inspections, and garbage collection routes. Integration of systems is a key component in being able to optimize services through data.
- COVID-19
    - Municipalities are working remotely, and streaming Council meetings rather than having face-to-face interactions due to the changes thrust on them by COVID-19. Some municipalities are adopting this model as a permanent way of doing business, and this requires availability to broadband services that allow residents and staff to interact seamlessly. There will be more pressure to municipalities to implement solutions quickly and offer online services.

These are some examples, but new technology opportunities appear daily, and the speed at which new innovations arrive is accelerating. Municipalities need to be well-positioned to evaluate and implement those innovations that can add value.

Being an organization that can react and embrace new technologies as they become available to deliver improved and ever more cost-effective services, must become a core competency for any high-functioning municipal organization.

2.3. Technology at Georgian Bay

In many respects, this is an exciting time for the Township as a number of changes have come together to create a good environment to drive technology change.

1. A new tech savvy Director of Finance, with a deep interest in using technology to transform Township services.
2. Adopting new technologies and setting up the Township with a 3rd party focus on delivering service, has created the foundation required for technology advancement.
3. A renewed focus upon adopting a corporate approach.
4. The completion of the Service Delivery Review highlighted the critical importance of technology in underpinning service efficiency and effectiveness.

At all levels, it appears the organization is recognizing that technology must be at the heart of the Township's vision for the future.

2.4. Importance of the Service Review

Due to the increasing importance of technology and its role in delivering municipal services, the Online Service Review is an important step for the Township.

Among the myriad of opportunities that the Township is bombarded with, the Online Service Review will help the Township determine its priorities and identify the key initiatives and activities that will support the Township's goals and objectives.

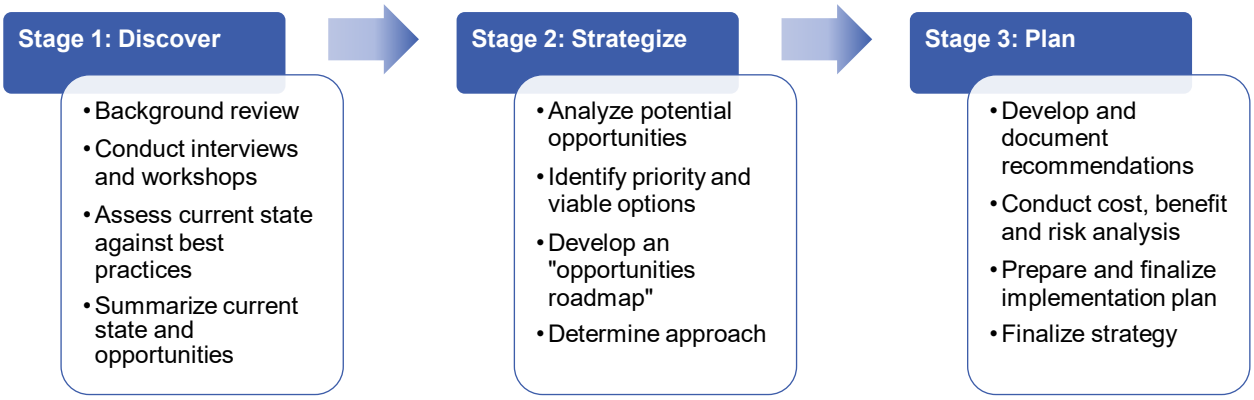
2.5. How the Online Service Review was Conducted

2.5.1. Three-Stage Approach

We used a three-stage approach that allowed us to validate, at each stage of the project, that we were going in the right direction and our recommendations were realistic for your organization. We have learned that no one organization is the same, and that recommendations and strategies must be tailored to fit an organization's culture.

The approach can be simplified into the following steps:

1. Understanding the current situation.
2. Establishing the future needs and understanding the people, process, and technology changes and initiatives that are needed to address the gaps and opportunities identified in Stage 1.
3. Plan the implementation and provide clear recommendations to support implementation.



2.6. Stage 1: Discovery and Current State Assessment

2.6.1. Initial Meetings and Documentation

During this phase of the project, Perry Group consultants held a virtual kick-off meeting with key stakeholders to review the proposed Work Plan and make revisions based on feedback.

The consultants gathered and reviewed background documentation to ensure that the goals and deliverables were well understood and in line with the Township's expectations.

2.6.2. Services Discovery

To understand the current systems in use and current levels of digitization, meetings with department heads and subject matter experts were held. The consultants provided an initial municipal services list to confirm the services the Township offers, and the respective service owners.

Interviews were conducted with business units to determine current levels of digitization and to discuss online service delivery potentials.

The Township's current online services list was built and assessed against Perry Group's Municipal Online Services Assessment (MOSA). The goal of this exercise was to identify the services that are best suited to move online, and the type of online service that could be offered, e.g., give information, report, status check, apply, book, pay, etc.

2.7. Stage 2: Strategy & Plan

As part of this phase of the project, data relating to each of the service transactions, processing times, paper usage and other operational costs to help us determine and set priorities.

The Senior Management Team met to review and prioritize the online services based on an assessment of the potential impact and effort of implementing the new services.

To ensure that the technology foundation was in place and to better understand if existing solutions would be able to meet the needs, the consultants conducted a fit-gap analysis against the Municipal Technology Maturity Model (MTMM). The outcome is outlined in the Findings section of this report.

2.8. Stage 3: Final Report and Recommendations

The final report compiles the results of the discovery and outlines a series of recommendations for the Township. This report also identifies the potential internal business solutions and online services, costs and implementation approaches for areas where gaps are found to exist.

A go-forward plan has been included as part of this report, including costs and resource requirements.

The goal of this project is for the Township to have a clear path forward, with a clearly defined action plan to move successfully into the subsequent implementation stage.

3.0 Findings

An assessment of the current state was the starting point for conducting this Online Services Review.

To review the current state, the consulting team looked at various aspects of technology and technology management, including:

- Seeking input from department heads and users.
- Reviewing existing online services offered by the Township.
- Reviewing technology systems, and
- Reviewing IT Management Practices.

The following section provides a high-level summary of the results of the findings.

3.1. Departmental Interviews

Interviews were conducted with each department to better understand the current state of technology at the Township.

Overall, there was a positive outlook on the changes that had been made in technology over the past 6 months, and many of the changes were credited to leadership by the Director of Finance who oversees IT.

Although many positive items were identified, there were areas where staff felt there could be enhancements.

Findings included the following feedback:

- There is a need for better administration of land management records in the Township.
- A common theme that arose from all departments was the ability to increase the Township's online presence by providing the capability for residents to:
    - Accept online payments,
    - Submit an online by-law complaint and then be able to track the status of that complaint,
    - Be able to purchase dog tags and burn permits online.
- The need to update systems, such as Vadim & Filehold, as these systems are critical to the business.
- The requirement to have tablets available to staff who work in the field to capture data and information (for example, with inspections, rather than waiting until they return to the office to manually enter the information). This reduces data entry errors and provides real time system updates.
- Connectivity has been highlighted as an issue in the Township and must be further explored.

- There is a desire to improve the customer experience, from availability of services online to providing information to customers in a user-friendly manner.
- In addition to increasing the Township's overall online presence, staff identified the need to also ensure things are accessible.
- Another item that was consistent from staff across the Township was the need to invest in training and ensure that programs are utilized to their fullest potential.
- It was identified that there are time constraints for staff that prevent them from being able to accomplish all the deliverables.
- Helix was hired as the external IT provider for the Township's infrastructure layer and their support has been well received from staff. Although Helix's assistance is good, staff did note that there is a loss of consistency and continuity with no in-house IT staff.
- The Township has seen huge improvements with the onboarding of the new Director of Finance and technology has taken a positive step forward.
- In the past, technology upgrades have been left too long and this has caused huge issues with upgrades of both servers and software programs.
- A need was identified for someone to discover new technology opportunities that may offer efficiencies and enhance service delivery.
- As noted above, there is a need to ensure systems are user-friendly for customers and also for internal staff.

3.2. Municipal Online Services Assessment (MOSA)

When considering which services to offer online, comparing the Township's online services with other Canadian municipalities is a useful benchmark.

Perry Group has prepared a list of *standard* online services that municipalities across Canada typically offer to their citizens. Not every municipality offers every one of these services – but these are the most commonly offered.

This research suggests that common Canadian municipal practices see municipalities offering the following:

- A clear website that is easy to use, navigate and search.
- Social media presence (Twitter, Facebook, YouTube).
- Online Bids and Tenders.
- Online payments (taxes, parking ticket, fire/burn permits, animal registration).
- Elections (online voting).
- Online maps.
- Online permitting and licensing services that allow users to submit, pay, track, and manage online applications.
- Online submission, tracking and management of service requests.

- Online bookings for facilities, equipment, appointments.
- Online eForms (and online processes) in place of paper forms.

Our consultants conducted the assessment by visiting the Township's website and attempting to find and or complete these transactions. Where we were unable to find the service, we consulted with Township staff to confirm that those service offerings are, indeed, not available.

The results of the assessment are shown in the diagram below.

Modern Customer/Digital Experiences

Customer / Experiences	Georgian Bay gbtownship.ca
Book a building inspection	N
Building permit application	N
Bulky Waste Pickup	na
Business licences	N
City App	N
Council / committee web streaming	Y
Council delegation request (form)	N
Customer knowledge base	N
Digital Signatures	N
Easy to use website	N
eForms	N
Employment search and applications	N
Engagement Platform	N
Events calendar	N
Filming permits	na
Fire / Fireworks permit	N
Garbage Day (Lookup)	na
Grants programs	N
Mail Alerts / Lists	N
Marriage Licence	na
Mobile website	Y
Online Agendas / Minutes	Y
Online bid management	N
Online chat with CSR	N
Open Data	N
Parking / infraction ticket payment	N
Parking permits / exemptions	N
Pay an invoice	N
Pay Taxes Online	Y
Personalization	N
Pet licence	N
Property Tax Calculator	N
Recreation program online booking	N
Rent a facility	N
Road closures	N
Sign permits	N
Single Account	N
Site suitability / selector / vacant land	N
Snow clearance status	N
Submit a service request	N
Submit development application	N
Submit digital plans	N
Tax account management	N
Tax certificates	N
Theatre Tickets	na
Track a service request	N
Track development application	N
Transit planning	na
Tweet for help	N

Figure 1: MOSA Assessment Results

This assessment confirms that the Township currently offers few online services.

In comparison to other municipalities, the Township lags in its online services delivery and there is a need to update the online services delivered to residents. The consultant reviewed this information with Senior Management Team as an input to setting priorities for new online services.

3.3. Technology Assessment

3.3.1. Introducing the Municipal Technology Maturity Model

The Municipal Technology Maturity Model (MTMM) identifies the technologies that a fully mature municipality would be expected to have in place and provides a framework for the consulting team to assess a municipality's technology environment.

The consulting team worked with Township staff and Helix to review the model and determine what is currently in place at the Township, as well as what is needed to be in place in order to implement new technology solutions.

The MTMM introduces several key concepts that are important for the Township:

- There are 4 main technology layers (labeled in the above diagram as: Infrastructure, Business Solutions, Integration and Customer-Facing). Each requires discrete IT skill sets to be managed effectively. For instance, while technology infrastructure management is deeply technical, business systems projects require project and process management, change management and people skills. Web projects need development and UX expertise. An IT organization needs a breadth of skills across the various layers to effectively manage the complete environment.
- The Infrastructure Layer is the foundation for the entire technology environment. Infrastructure must be robust and reliable because it provides the foundation for all other layers. Unreliable infrastructure undermines all the technology that sits above it.
- Appropriate policies, security, data protection and disaster recovery provisions should be in place to protect the Township's information assets and meet its legal compliance obligations. Ideally, the IT team should have the tools needed to help manage the environment efficiently. These include a helpdesk request tracking system, systems management solutions, and automation tools (e.g., remote support, patch management, mobile device management) to simplify IT management tasks, increase IT staff productivity and enable employee self-service (e.g., password resets).
- A municipality should limit the number of corporate business system platforms it runs to minimize process and information silos. These core systems should be purchased off-the-shelf solutions configured to support the Township's business processes – customization should be avoided. These business systems, or business platforms will 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 systems should be integrated allowing for data to be automatically passed between systems (using integration technologies), thus reducing data duplication and errors, and ensuring auditability, while enabling data analysis and predictive capabilities.
- Customer-facing digital solutions should allow customers to easily find information and answers to common questions, to transact with the Township (e.g., submitting requests and applications, making payments), and allow the Township to engage with citizens to seek their input on important decisions. All of these systems must be integrated into back-office systems. If processes are not digitized in the back-office, they cannot effectively be offered online.
- The IT architecture should build from the bottom up – Infrastructure first, then Business Solutions, and so on.

These are some of the basic tenets that underpin a well-designed municipal technology environment.

3.3.2. Assessing the Township's Technology against the MTMM

The diagram below provides a visual summary of the results of the consultant's assessment of the Township's technology environment.

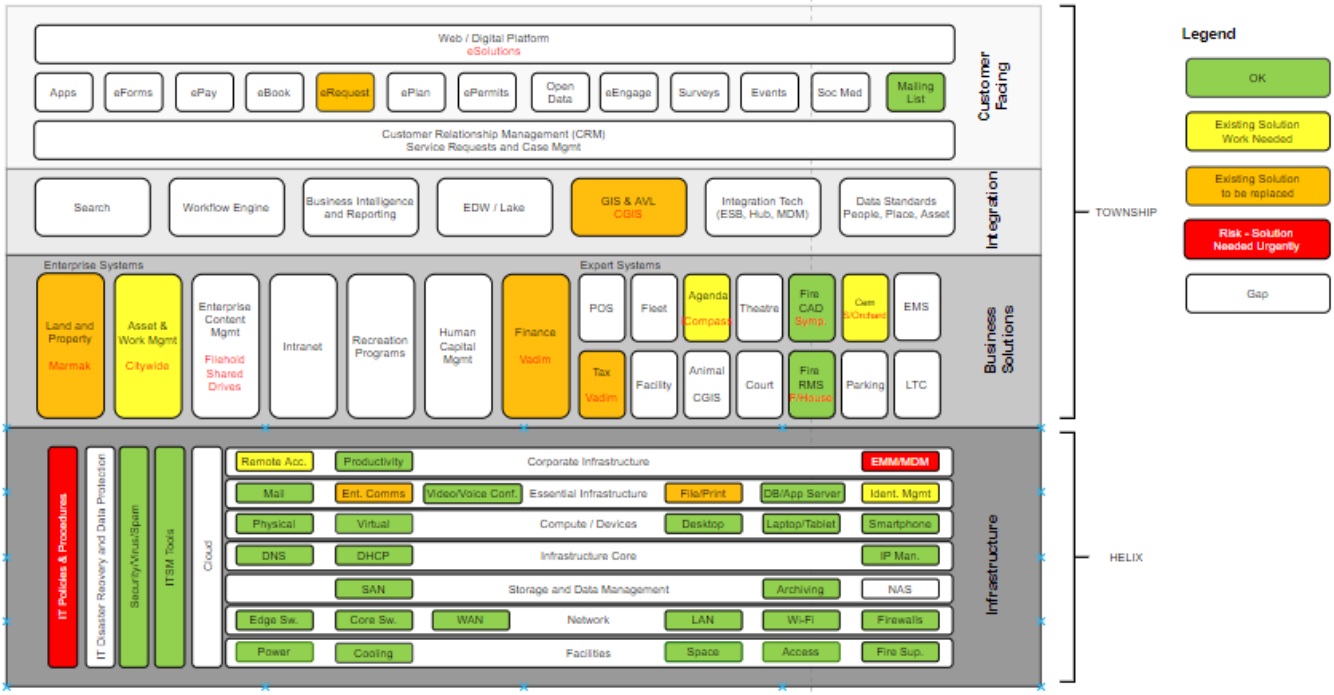


Figure 2: MTMM Assessment Results

While the green components in the diagram identify that there are a number of positives, there are still a few areas to address in this layer, and there are a few gaps, risks and areas that require work.

The following section highlights key points in each layer of the MTMM.

Infrastructure

Positive Aspects:

- The Township has offered and deployed modern device choice (everyone has a laptop/tablet to be able to work remotely).
- Older systems have been migrated and internet has been updated (i.e., fibre into the main building).
- Servers are hosted and replicated between two sites (3rd party is hosting).
- Moved to Office 365 Cloud environment which offers greater access to files and email.

Key Issues:

- No Mobile Device Management (MDM) system is in place and no policy exists for management of devices.
- Connectivity issues exist; at this time, the Township is not investing in any rural broadband.
- IT Policies & Procedures need to be updated (i.e., Acceptable Use Policy, Cloud).
- The telecom system is aged and needs replacing.
- The technology procurement lifecycle and planning process could be improved.

Business Systems

Positive Aspects:

- The Fire department system (Firehouse) is hosted by Barrie.

Key Issues:

- The Financial and Tax system (Vadim) needs to be replaced; unable to upgrade due to being too many versions behind.
- The Township has no effective Human Resources (HR) system and an HR strategy needs to be defined and developed.
- The Township has no effective Work Management system.
- The Township has no effective Asset Management system.
- The Township does not have an intranet.
- Land & Property Management systems are old and need to be replaced.
- Parking, animal license registration, fire registration and recreation programs are all done manually.
- Council agenda management is manual, and no workflows exist.

Integration

Positive Aspects:

- Have ability to report out of core systems (i.e., Vadim, FMW, Filehold and iCompass).

- CGIS is in place, although there is an opportunity to update to a more widely used program that integrates with many other key municipal systems.

Key Issues:

- There is limited ability for staff to search and discover unstructured content.
- There is no true corporate data reporting / Business Intelligence platform.
- In numerous areas, data integrity is compromised through a lack of integration resulting in data duplication / manual data entry / data manipulation.
- There are no integration technologies in place to facilitate systems integrations.

Customer-Facing

Positive Aspects:

- The Township has updated its internet platform with eSolutions (iCreate).

Key Issues:

- No service request system in place (users can submit complaints via the webform but this simply generates an email and does not track complaints).
- No truly end-to-end online services are available due to limited backend integration and systems (e.g., online parking registrations are manual).
- No solution to handle online payments (parking, animal licenses, fire burn permits, recreation programs).

3.4. Summary

In summary, it is clear that there is work required to be done in all layers of the MTMM.

Since the move to Helix and the implementation of a series of enhancements identified in the Township's IT Strategy, the Infrastructure Layer is in good shape. Some attention is required to address policy and procedure gaps as well as a system to manage mobile devices, but broadly speaking, the Township is in a good position here. A solid infrastructure is the foundation for all technology so this is a great start.

However, the responsibilities of Helix largely stop at the boundary between Infrastructure and Business Solutions; Helix supports the Infrastructure but does not support any of the technologies above this layer.

As a result, in contrast to the solid situation in the Infrastructure Layer, many of the Township's core business systems need replacement, a net new system is required, or existing systems require work. Indeed, the next frontier for the Township is really the Business Solutions Layer.

Work needs to be done on the integration level. There are many opportunities for improved data integrity and data processing efficiency would be realized.

Major work is needed at the Customer-Facing level which, of course, is the focus of this study. But work should start in the Business Solutions Layer if the Township is to offer effective, end-to-end digital services.

3.5. IT Management and Resourcing

The Township has outsourced its management of the Infrastructure Layer which has been a positive move for the organization. This has included upgrading the email and MSOffice suite to Office365, implementing an IT Service Desk through Helix and monitoring the health of the system.

IT is currently part of the Finance team and there is no dedicated resource to oversee system implementations, understand the technology needs or work with the Township's departments to assist in business solutions technology implementation.

There is no Business System Specialist to assist in business requirements gathering, solution planning, business process design, and to work with vendors on the implementation of systems. This has been identified as a gap in the structure.

3.6. Staffing Ratios

Typically, in Ontario municipalities, IT staff make up between 1-4% of total staffing.

Those that invest more in technology tend to be more advanced in their utilization of technology – thus, municipalities such as Innisfil, Newmarket, Burlington and Kitchener that devote a higher proportion of staff to technology are further ahead with their technology efforts.

Georgian Bay currently does not have an onsite IT staff member, although Helix manages the infrastructure and support of the foundational systems. The work that Helix does on behalf of the Township is equivalent of 1 or 2 people, which still falls short of the 3% suggested staffing for IT. It should be noted that even though Helix supports the foundational layer, there are still gaps in the other layers, as a result of not having onsite support.

It is important to note that the number of IT staff should be proportional to the number of total staff so, as the Township grows, it should expect its IT staffing to grow in parallel.

3.7. Key Opportunities for the Township

Several observations from the consulting team, unrelated directly to Online Services, are worth sharing.

- The Township should consider the implementation of a Mobile Device Management (MDM) system to prepare for the increased deployment of mobile devices in the field. This system will allow for the control and maintenance of devices, ensuring security and connectivity is in place. Use of mobile devices will ultimately eliminate the time required to enter data after-the-fact.
- File and print services need to be reviewed and updated to accommodate the changing work environment.
- The telecom system is aged and needs to be replaced –modern collaboration capabilities have advanced and make it easier for connectivity with remote users

As evidenced by the MOSA assessment, it is clear that there are many opportunities to improve customer service delivery to customers. The consulting team identified the priority areas of focus for the Township as follows:

- **Service Request Management**: The Township has no service request management system in place. Users can send in complaints via the webform, but this simply generates an email and does not track complaints.
- **Online Payments and Registration**: Online payments and registration of licenses, especially during COVID, have become more important to the Township. Online payments and registrations in areas such as parking, animal license registration, fire registration, burn permits and recreation programs are all done manually today and each of these represent strong candidates for online services.
- **Business Process Digitization**: There are several gaps in the digitization of business processes which are needed to underpin the delivery of online services. The Township must upgrade a range of business systems (e.g., Finance & Tax system, Land & Property Management system) in order to be able to integrate and digitize core business processes.
- **Work and Asset Management**: The Work and Asset Management system is in place, but review and potential replacement of the system need to be done to leverage other opportunities that exist within an ERP system.
- **GIS**: The GIS system needs to be updated to a more industry standard solution (possibilities exist to work with the District of Muskoka to leverage its systems and staff).
- **Internet Connectivity**: Finally, as with many rural communities, internet connectivity issues exist which hamper use and adoption of technology for residents, businesses and Township staff. The Township may want to consider investigating provincial funding opportunities for rural broadband.

4.0 Responding to Changed Customer Expectations

In this review, the Township is rightly considering moving services online because customer expectations in 2020 have changed. Not only has COVID reduced the desire for personal interactions and shown how offering services digitally can work, the reality is, many citizens today rely on their devices to get stuff done.

We have all moved from a situation 25 years ago, where booking a flight was so complex, you needed a travel agent to do it for you – to a world in which you can book your own flight with a few taps on your smartphone in the blink of an eye.

Think of all the service industries and about how technology/digital has changed them:

- Finance – Online and smartphone banking, online trading
- Media – Netflix, YouTube, Disney+, Prime, CBC Gem
- Travel – Airbnb, Expedia, aircanada.com
- Retail – Amazon, Indigo, beer and wine direct
- Transportation – Uber, Lyft
- Insurance – Compare and buy insurance online, report a claim online
- Exercise – Peleton, online classes
- Education – Online school, remote tutoring
- Health – Telehealth, online therapies

Unquestionably, we are in the *Smartphone and Internet era* and this has changed customers' expectations about what service looks like today. Delivering online has become *the way* that services are delivered in the 21st century.

Governments too are responding to these changed expectations and are rapidly moving services online. Think about the online services that Service Ontario offers for example, allowing customers to renew health cards or driver's licenses, get their vehicle sticker or fishing license, all while in your PJs using an iPad on the sofa on a Saturday night.

Today, over 92% of Ontarians have access to the internet at home, 88% of Canadians bank online, 76% have smartphones. So, introducing online services is not for the minority – it is for the majority.

It is important to note that, even when the Township introduces online services, this does not mean it will stop offering services via existing methods or channels. Customers would still be able to call or drop into Township offices to carry out a transaction, to seek advice, to submit an application or pay a bill. The introduction of digital services can be offered as an additional option that customers can choose – and one we're certain many *will* choose because of its convenience and ease of use.

4.1. A Vision for Online Services

In response to these changed expectations, the following section illustrates a more online-enabled set of services that the Township could offer.

In order to embrace the online opportunities, interacting with the municipality needs to be simple, straightforward, and designed around the convenience for customers and staff alike.

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 an app to notify the Township of the problem. The request is received, automatically categorized, located and recorded in the Township's Work Management System. The Work Management System automatically dispatches the request to a crew in the area. The crew receives the request on a laptop in their vehicle. They proceed to the site and repair the stop sign. They track the time taken to fix the problem and input the labour, equipment and inventory used to carry out the repair and close the work order.

Mary immediately receives a notification on her smartphone that the issue has been resolved. On the way home from work, as she passes the scene of the morning's accident, Mary feels reassured that the Township is working hard and smart to keep citizens safe.

In the background, integrated technologies such as telecommunications, networks, mobile devices and business systems (e.g., Service Request software, Work Management, GIS, and Finance systems) are working in concert to allow the Township to offer simple access to services, and to alert and provide field staff with the information (asset records, maps and drawings) that they need to fulfill the work order. Processes are designed to make the end-to-end process simple to interact with for customers and easy for staff to administer.

Today, at the Township, field staff manually record information and go back to the office and pass off to administrative staff to enter information into a system or a file folder. The introduction of mobile devices connected with systems used by office and customer service staff would eliminate this manual work. It would also reduce errors in entering data and provide up-to-date information in a timely manner.

Jane has just moved into a new home in the Township. She calls to inquire about setting up her tax payments via direct deposit. The staff member directs Jane to the sign-up available on the Township's website, shows her other services that she can access online, and asks "Is there anything else I can help you with?". Jane proceeds to book her youngest child, Rachel, into swimming lessons, finds out when her garbage collection day is and where she can pick up a new recycling bin, and arranges for a parking pass for her family (who are visiting from out of town to help with the move) – all in the one call.

Enabling staff to handle multiple transactions from different departments does not happen by accident. It must 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 appropriate back-office team, as needed.

Marsha lives in Toronto and is building a new cottage in Georgian Bay. It's difficult for her to get up to the municipality, so she submits her permit application online, pays her fees and submits the drawings. A few adjustments are required by the CBO and Marsha has her architect make the changes and submit the revised documents online. With some key work done on site, Marsha books an inspection of the work. The building inspector visits the site and uses their tablet to record the results of the inspection. The inspection passes, Marsha and her contractor are notified by email of the outcome of the inspection and work on site continues.

With each interaction, customers are offered choices about how to interact with the Township. Each interaction leaves a lasting impression of how effective the Township is.

These are not dreams of a Jetson's future.

Real municipalities are delivering their services *in this way today*, and they don't need to be large to do so.

For instance, citizens in Grey Highlands, North Middlesex, and St. Mary's can today submit and track building permits and drawings online. Building inspectors in those communities use mobile technology to help them complete their inspections.

In larger municipalities, people can report a sign down or pothole via smartphone, can search and review planning applications and associated drawings, can generate their own tax certificate online, or get a marriage certificate.

Communities throughout Ontario are increasingly using technology in various ways to make customer service simple and cost-effective – and small municipalities, nimble as they are, can often implement these solutions much faster than their larger counterparts.

4.1.1. Service Delivery in Multiple Ways – Encouraging Digital Adoption

The Township will continue to offer all services across all channels – face-to-face, phone and digital – so those who don't wish to use digital channels, won't be forced to.

Nonetheless, it is worth noting that the most recent information available from Statistics Canada for internet penetration in Ontario (from 2013) identified that 84% of households in Ontario had access to the internet. It is reasonable to assume in 2020 that this number is higher. In addition to home-based internet (according to the CRTC) over 73% of Canadians had a smartphone in 2015. According to a Media Technology Monitor report in 2016, "74 per cent of people aged 65 and older were using the internet regularly in 2016". So, the vast majority of citizens have access to, and likely a willingness to use digital channels offered by the Township.

For the Township, there is a real cost imperative to encouraging the adoption of digital channels. Although there has been limited research in this area in Canada, some studies have examined municipal transaction costs across the primary customer service channels. The table below indicates average costs of local government service delivery modes taken from research in the UK, Norway and Canada.

	Estimated Transaction Cost (in CAD)		
Service	**UK**	**Norway**	**Canada**
Web / Online	$0.14 - 0.27	$0.46	$0.91
Phone	$5.02 - 6.01	$6.23	$5.50
Face-to-Face	$15.28 - 18.66	$12.46	$12.00 - $30.32
Postal	$21.45		

The results are consistent in their message: online transactions cost a fraction of the cost of phone or face-to-face transactions. Notably, from one study in the UK, postal based transactions (that the Township uses for some of its services) are the most expensive transactions.

Thus, implementing online services and encouraging their adoption is an important way for the Township to reduce staff time processing requests and overall transaction costs.

4.2. How to Reduce Costs – The Importance of Digitization

The Township must digitize its processes to enable efficient and effective service delivery.

To enable the types of integrated service offerings experienced by Mary, Jane and Marsha, the Township must use its business systems to manage services and automate processes. Effective municipalities rely on the combination of **people**, **processes** and **technology** working together in a synchronized way to deliver services to customers.

Collectively, the **digitized platform** is the set of processes and technologies that work together to enable customers to interact with the Township, and to enable Township staff (customer-facing staff, back-office staff or field crews) to manage processes and deliver Township services to its customers.

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 shared tools and technologies that connect customers and staff, and link staff that support different parts of processes together.

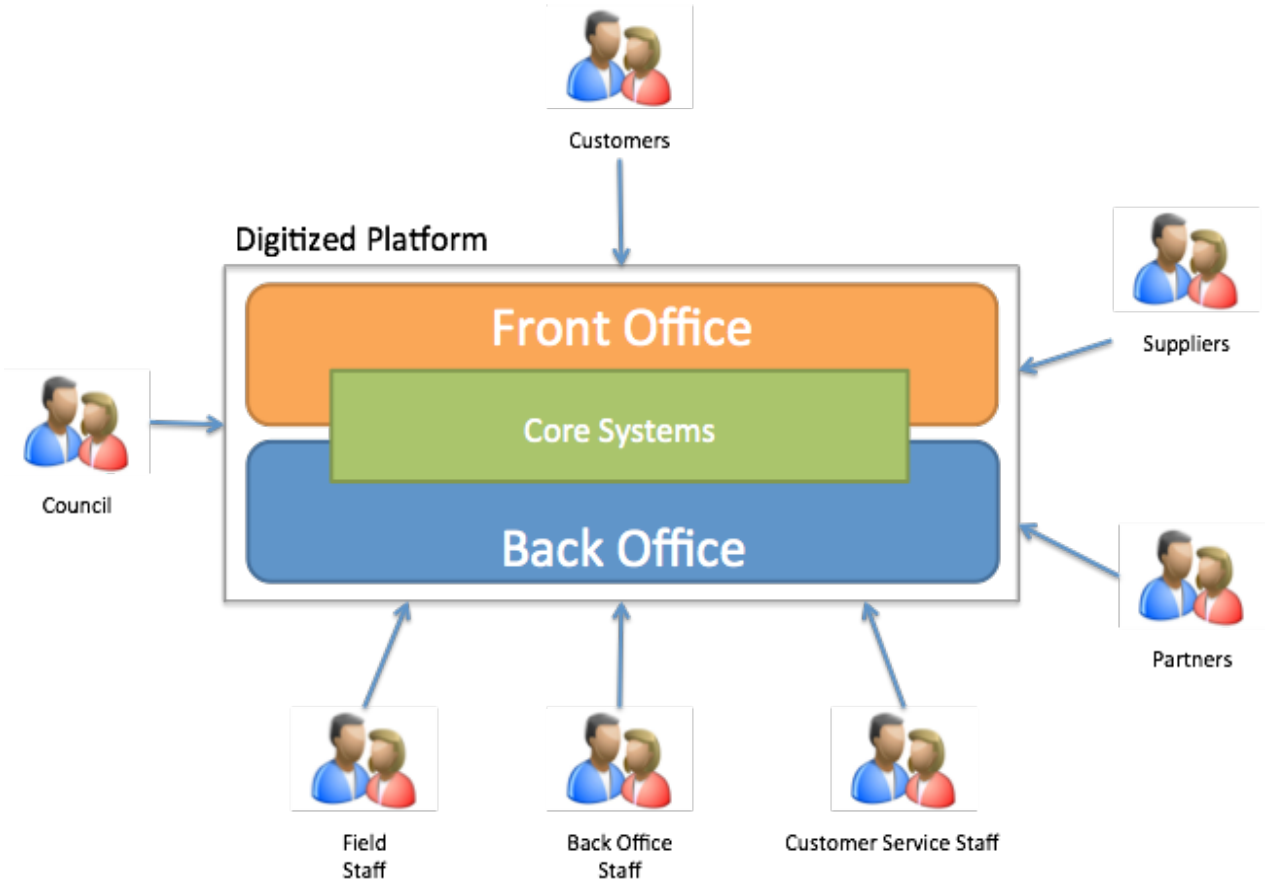


Figure 3: The Digitized Platform

The digitized platform is centered on a powerful central core of business systems (e.g., Finance, Work Management, Permitting, Licensing and Land, Recreation Management) that drive most of the operation of the Township. These core systems connect front office and back-office processes that facilitate services to customers, manage interactions with suppliers and enable collaboration with partners.

Systems in use should be common and shared across departments / business units so that tasks initiated by one department can be allocated to other departments, such as a change in a permit application status (in Building) triggering the processing of a pre- approved payment (in Finance).

It is the full digitization of processes that is critical to becoming an efficient Township that can deliver end-to-end customer-centred digital services.

When processes are digitized and managed electronically, all transaction processing, workflows, notifications, quality checks and validations can be carried out online, so they can happen anywhere (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 when all of the processing is handled online. The online chain provides complete visibility of the process throughout the organization.

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

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

Digitization also makes it easy to add new services (such as the introduction of a tree by-law) because changes can be introduced through established business systems that already support the online applications process, back-office administrative tracking (such as processing payments) and providing data to field crews.

The full digitization of processes and the digitized platform is what makes the Township tick, and it is in this area that the Township must focus, over the next few years.

5.0 Evaluating and Setting Priorities

So, with a sense of the vision for the future, many opportunities to choose from, and limited resources to apply, how does the Township select which services to move online?

Which processes should the Township invest in moving online? Which will offer the best value for the community? Which will offer the greatest ROI for the Township?

The consulting team worked with SMT to determine a set of priorities.

5.1. Online Service Candidates

Based on an initial services list, the consulting team reviewed service opportunities with the Senior Management Team and representatives from each business area. The Township identified an initial list of 41 candidate services to be considered for moving online.

Service Name	Service Description	Public / Internal	Municipality Provided Service	Top 30 Municipal Online Services	Does Municipality Currently Offer this Service	Is offering this service online a priority for your department	Transaction Volumes	Perry Group suggested area good for online service	Project Manager / Process Owner	Department
Animal Registration	Registration of animals for ease of identification.	Public	Y	Y	N	Y	30+		Tony VanDam, Director of Emergency Services	Fire Department / By-Law Services / Emergency Management
Arts and Cultural Grant Awarding	Grants to organizations that provide arts and/or cultural events.	Public	Y		N	Y	8		Jen Schnier, Director of Sustainability	Sustainability / Communication / Economic Development
Building Permission and Enforcement	Approval to construct, demolish and/or alter a building in compliance with Building Code standards. Building permits including septics	Public	Y	Y	N	Y	500		Dave Fedowriw, Chief Building Official	Building Department
Licensing	Permission to operate a business activity, Lottery, Liquor etc.	Public	Y	Y	N	Y	25		Karen Way, Clerk	
Business Retention	Offering support to retain businesses in the municipality and advice on how to grow	Public	Y		N	Y			Jen Schnier, Director of Sustainability	Sustainability / Communication / Economic Development
Communications	An internal / enabling service offering support to the Corporation in terms of imparting	Internal	Y		N	Y			Jen Schnier, Director of	Sustainability / Communication /

Figure 4: Sample Municipal Services List

Using various factors – including transaction volumes, an assessment of the impact to residents, anticipated resident expectations of receiving online service, and internal efficiencies that could be achieved as a result of moving the service online – the consulting team worked with Senior Management Team (SMT) to reduce the candidate list to 22 processes, as follows:

1. Taxation – Online Payments/Viewing Accounts Online
2. Default Fine Collection/Provincial Offences – Collection of Fines
3. Fire Permission – Online Fire Burn Permits
4. Elections – Online Voting
5. Building Permit & Enforcement – Building Permits/Inspections/Compliance

6. Parking Enforcement – Parking Fines / Online Payments
7. Development Approval – Online Development Applications
8. Property Standards / By-Law Enforcement – Compliance with Property Standards, By-Laws & Regulations
9. Records Access – Internal Information Management
10. Animal Registration – Online Animal Registration
11. Fire Safety / Prevention – Fire Prevention, Inspections
12. Licensing – Online Licensing
13. Council Representation – Online Citizen Engagement / Input
14. Human Resources Management – HR System (including ATS (Application Tracking System))
15. Parking Permissions – Parking Tags
16. Arts & Cultural Grant Awarding – Online Grant Applications
17. Taxation – Collection of Various Forms for Tax
18. Roadway Access – Access/Road Occupancy Permits
19. Elections – Information for the Public
20. Public Service – GIS
21. Complaint Tracking – Tracking of Customer Complaints
22. Service Requests – Requesting Service (i.e., Notification of Pothole, Service Request)

The services were graphed to visualize the high-volume services-based number of transactions on an annual basis.

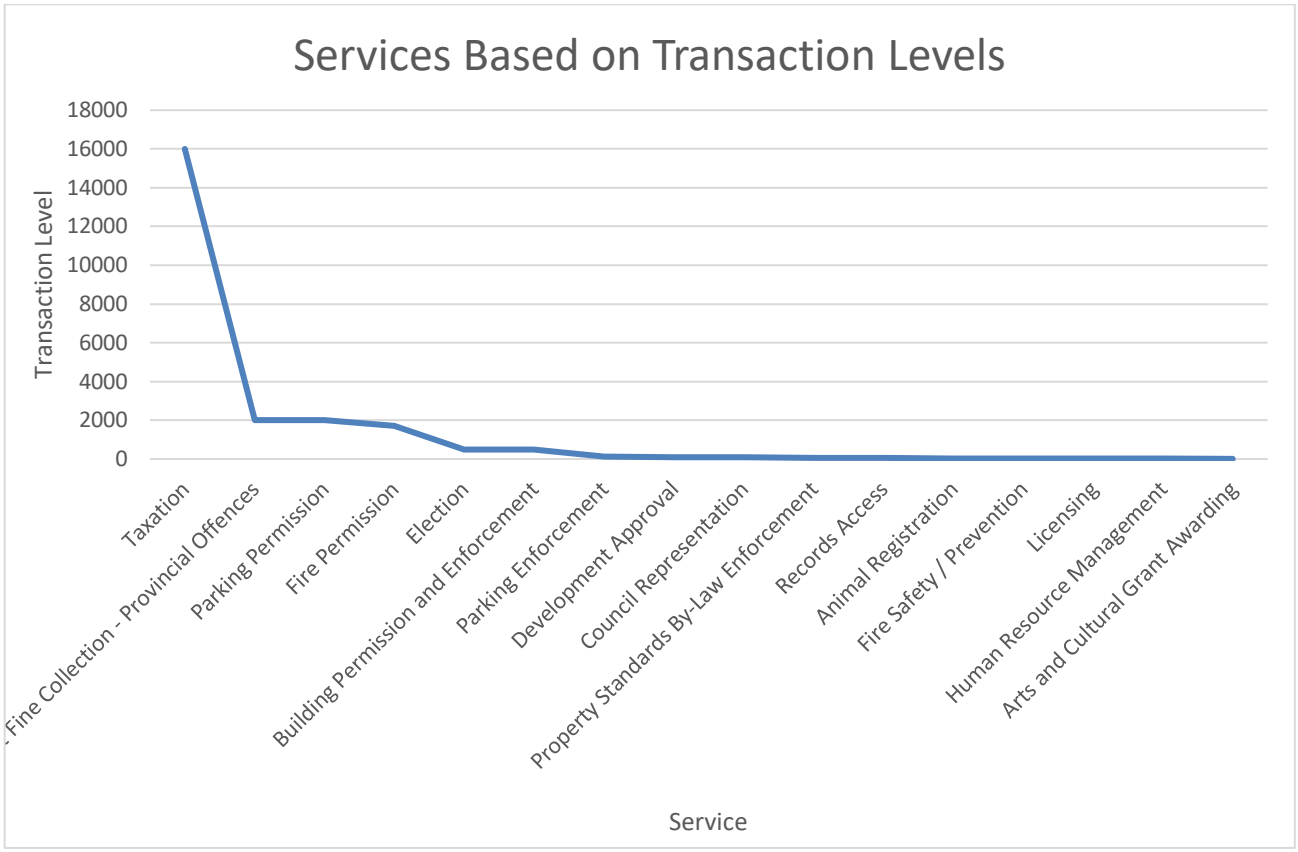


Figure 5: Municipal Services List Transaction Levels

5.1.1. The Long Tail

Interestingly, the above diagram follows a common phenomenon known as the “long tail”. Think of the music industry, where there are a small number of high selling artists who hit the charts with best sellers, but a massive number of artists that sell a smaller number of records that are in the long tail.

The majority of municipal services are not high volume – particularly in a smaller municipality such as Georgian Bay. There are hundreds of municipal services (the “long tail”) with smaller volumes of transactions involved. Individually, the business case for “e-enabling” each of these long tail services is hard to make, since there are far fewer transactions and fewer people using them. As a result, the trend is that most municipalities have not implemented many online services in the long tail.

But *collectively* there are a large number of transactions in the long tail. If the Township can find solutions that address the common needs in the long tail (such as online forms, payments and registrations) then significant numbers of services can also be e-enabled.

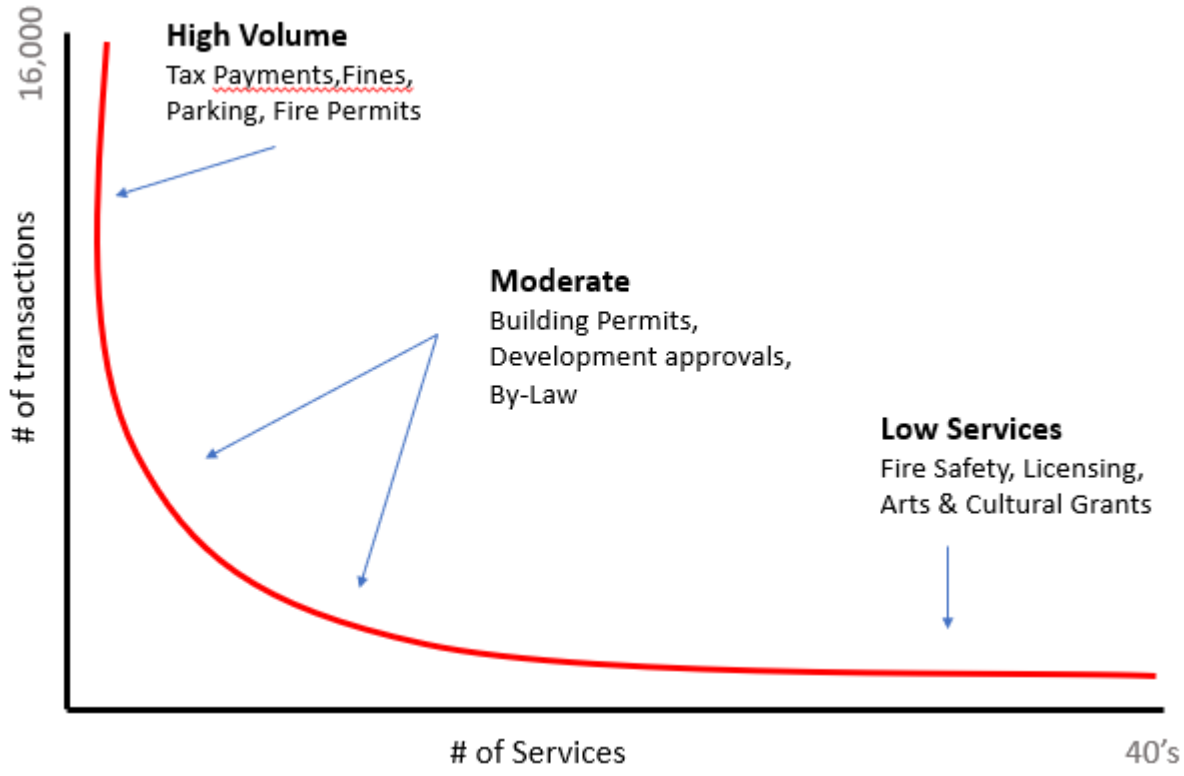


Figure 6: Long Tail of Online Services (hundreds of services used by small numbers of users)

Larger municipalities have moved further down the long tail and have focused on providing status and tracking capabilities (for applications, requests, complaints), because of the volumes in which they deal. Simple follow-up questions about status can tie up a significant number of staff resources. It is clear that mid-sized and smaller municipalities are beginning to follow this trend and implement these services too.

5.2. Prioritization of Services

The ranking of services by transaction volumes helps garner input on prioritization.

Two specific areas immediately stand out as having the highest potential impact due to transaction volumes. These are:

- Online Payments (including building permits, taxes, animal registration/licensing, fire burn permits, tickets (parking and other) and fines)
- Service Requests (creation of forms that send out a service request to the field workers)

SMT and the consulting team used an effort and impact matrix to help identify the highest value opportunities.

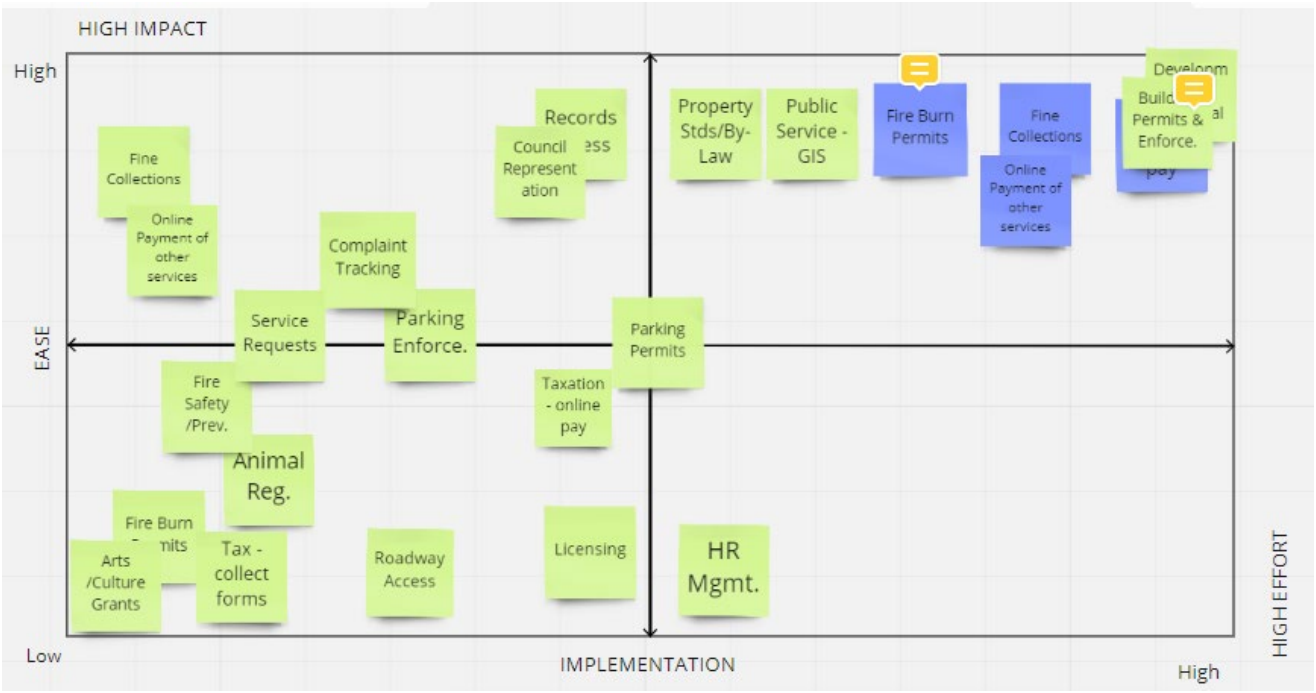


Figure 7: Prioritization Process

SMT categorized the services, based on an estimate of impact and effort levels, and also considered whether the Township has a business solution in place at this time that could address the requirement.

The result was a categorization of candidates into the following 4 quadrants:

- High Impact, Low Effort
- Low Impact, Low Effort
- High Impact, High Effort
- Low Impact, High Effort

Following the review with SMT, several of the 22 business process candidates were identified as poor candidates to move online either because demand was expected to be low, or that the cost and value of implementing a solution could not be justified (low impact, high effort). Six (6) of the original 22 candidates were also combined into a single initiative – Online Payments.

As a result, the initial list of 22 candidates was further reduced to a set of 10 top priorities, which are:

1. Online Payments
2. Online Service Requests
3. Online Complaint Tracking
4. Online Council Representation / Citizen Engagement
5. Online Records Access Requests
6. Online Parking Permissions / Parking Tags

7. Online Fire Prevention Inspection Request
8. Online Tax Account Management
9. Online Arts and Cultural Grants
10. Online Roadway Occupancy Permits

6.0 Implementation Options – Key Decision Points

6.1. Priority Online Services

Based on SMT's prioritization, the following items have been identified as the opportunities that represent the Top 10 services that the Township can move online to provide the best value to its community.

1. **Online Payments –** the ability for customers to pay any/all Township bills online in various formats (e.g., credit and debit card).
2. **Service Requests** – the ability for a customer to request a service (i.e., identify a pothole exists). The customer visits the Township's website to enter the complaint, the system would open up a service request and assign a work order to the relevant team. The customer would be notified electronically when the request is closed.
3. **Complaint Tracking** – the ability for a customer to formally report a complaint, for the complaint to be investigated/managed through the process, and then for the customer to be notified once their concern has been addressed.
4. **Council Representation / Citizen Engagement** – the ability to seek online input and conduct engagement exercises online.
5. **Records Access** – the ability for a customer to submit and pay for an FOI request.
6. **Parking Passes** – the ability for customers to request and pay for parking passes.
7. **Fire Safety / Prevention** – improved online content and ability for customers to book an inspection online.
8. **Taxation** – the ability to view and pay property tax bills, change of ownership or mailing address, rebates and deferral programs, viewing history and supplementary tax bills and requesting a tax certificate.
9. **Arts and Cultural Grant Awarding** – the ability to offer an online application for grants, in-kind services, and partnerships to non-profit organizations through the Municipal Arts and Cultural Grants Program, such as events, projects, festivals, and programs.
10. **Roadway Access** – the ability to apply for a road occupancy permit.

6.2. Common Patterns

What emerges from these priority requirements are a set of common patterns or online capabilities that would help the Township address these requirements and support moving additional services online in future.

These common patterns include:

1. **Submit a Form** – allow a customer to fill an online webform, attach documents, sign and make payments and submit electronically. The form could be used for applying for something (a grant, a permit), submitting some required information (a fire safety plan). It is digital, is available on mobile devices and has the ability to

validate information submitted to reduce customer errors. A form may require the ability to identify a location using either an address or a map.

2. **Submit a Service Request** – this allows a customer to report a problem to the Township by identifying the problem and providing key information (including photos) about the problem (dependent upon the problem type). The service request information is directly sent into the Work Management System so that the work can be tracked through inspection and resolution.
3. **Make a Payment** – this allows a customer to make a payment for a Township service (before or after receiving the service) using credit, debit and other payment forms. This payment processing should allow for reconciliation within the Township's finance system so that payments are matched to corresponding accounts.
4. **Make a Booking** – this allows a customer to make a booking with a Township staff member (e.g., for an inspection, to visit Township offices in a safe manner) that is integrated into staff calendars and accords with staff availability.

By implementing technologies that can support these common patterns, the Township can establish a powerful toolkit that will allow staff to move several of the Top 10 services online. This will also enable staff to move other services online not identified in the Top 10, and to design new services in the future to be online-first services.

6.3. An Integrated Approach

While the above patterns provide for the implementation of quick wins, as we have discussed earlier, online services work best when they are integrated with back-office systems that office and field staff use day-to-day to do their work.

For instance, in the example that we discussed with Mary reporting a problem with a stop sign, ensuring that the request is directed automatically to the right people can only be done with the right business solutions in place.

Today, the Township already offers an online service for customers to report a problem, but that system simply generates an email that can get lost or that must be re-entered into the Citywide system.

What is missing, is the systems integration. Integration between the systems would reduce administration effort, reduce or eliminate duplicated efforts, reduce errors and speed up the resolution of requests.

So, while in the short-term, there are opportunities to introduce an improved experience for the customer by implementing quick win solutions, in the long-term they should be integrated to back-office systems.

6.4. Best of Breed vs. Integrated ERP Solutions

Looking at the MTMM shows that there are various business solution requirements that a municipality has – for business functions such as Recreation, Finance, HR, Planning, Permitting, Fire Dispatch and Record Keeping, Tax, Work and Asset Management, etc.

The general direction that MTMM provides is that municipalities should, where possible, limit the number of systems that they operate – consolidating systems and processes into common solutions.

There are 2 typical strategies pursued by municipalities in addressing their business solutions needs, each with their own pros and cons.

6.5. A "Best of Breed" Approach

In pursuing this approach, the best solutions for each separate business function are selected and implemented. The municipality runs various (often many) different software solutions from different vendors to support the specific business requirements of its different teams and functions.

This is the strategy that Georgian Bay is currently following.

The benefit of this approach is that good solutions that are specific to the needs of each team can be implemented. The negatives are that there is a requirement for integration between systems (which can be costly and complex and, as a result, often delay or derail implementation), separate systems reinforce team silos and it is difficult for staff to learn all of the systems in use.

6.6. An Integrated ERP Approach

In contrast, the integrated approach sees an organization select a more comprehensive, holistic municipal solution that addresses the majority of the core needs of a municipal organization (e.g., Finance, HR, Permitting and Licensing, Recreation and Tax).

Such a system is often pre-integrated, ensuring that data flows between modules (e.g., permits to finance) and may offer a range of online services built into the system (such as tax account management or online building permitting).

The benefits of such an approach are:

- A reduced solutions portfolio that allows staff to grow fully familiar with the solution.
- A pre-integration of technologies.
- One point of accountability.
- Improved relationship management.

The negatives of the approach include a potentially reduced feature set for some functions, some increased dependency and thus risk with a single vendor.

We highlight these two approaches, specifically because the municipality is at a key decision point regarding its Finance system. A conscious decision about the future strategy going forward should be made with SMT's involvement.

6.7. Key Decision Points

So, while in the short-term there are opportunities to introduce an improved experience for the customer by implementing quick win solutions, in the long-term they should be integrated to back-office systems.

We recommend that the Township also consider the longer-term view. As a result, the Township has some key decisions to make that will influence the approaches that will be taken to implement the prioritized online services.

With the Top 10 priorities identified, the most pressing decisions include:

1. A decision about the future of the Township's Finance & Tax system. This has a direct impact on the Township's Tax Account Management offering, which needs to use the Tax System features; and, if the Township decides to pursue a more integrated approach, as discussed in the previous section, it could have a much wider impact. Options available are to upgrade Vadim or replace Vadim with either a similar scoped solution, or a more comprehensive system that has capability to address Finance and Tax requirements, and potentially broader needs of the organization as well.
2. A decision about the future of the Township's Work and Asset Management Systems. The Township has implemented portions of the PSD / Citywide Work and Asset Management System. Before implementing any new functions (notably, online service requests) the Township should determine whether this will be the Township's long-term solution or whether the Township also chooses to purchase a fully integrated system

In addition, important decisions and strategic direction-setting in the following areas must be resolved:

1. A decision about replacement of a Land & Property Management System. If the system is to be replaced, does the Township implement this as part of an integrated or best of breed solution?
2. Update GIS system (potential to work with District of Muskoka).

6.8. Re-Using Existing Tools and Solutions

Another best practice that the Township should embrace is the concept of reuse.

Wherever possible, the Township should re-use existing tools and technologies that have already been implemented to realize their online service aspirations. Importantly, the Township has implemented some good solutions that we believe should be re-used.

These include:

- The Township's eSolutions website.
- CityWide / PSD Work and Asset Management, including the Citizen Request Portal.
- Office365 – SharePoint Lists, Bookings.

7.0 Go Forward Plan

For each of the priority online services, there are a variety of options for implementation. The following section identifies options and provides a recommended approach in the short and long-term.

The first objective is to make service easier for the customer. This means that customers, including seasonal residents, would not have to drive to do a transaction with the Township. They would be able to do their transactions online. There is a huge change in the meaning of the web and what it is used for. In the past, the web was seen as a communication tool, a place to go to look up information. Now, the web is a customer service platform, a place to get stuff done, like paying bills or completing forms. This is what the consultants looked at first in their identification of implementation options.

The second goal is to improve the back-end processes, and this is where the Township will see improved efficiencies. This long-term plan encompasses integrating systems and processes in the back-end so that staff have more time to do value-added work.

7.1. Implementation Options – Short- and Long-Term Recommendations

Service	**Online Payments –** the ability for customers to pay any/all Township bills online in various formats (e.g., credit and debit card).
Sample	https://www.haldimandcounty.ca/online-tax-invoice-payments/pay-accounts-receivable-bulk-water-septic/
Options	• eSolutions • Paymentus • PaySimply • Bambora • Vadim Payments • Stripe
Short-Term	eSolutions Paymentus or Bambora solution
Long-Term	Consider implementing an integrated online payment solution as part of integrated ERP solution, providing pre-integration into the Finance System.

Service	**Service Requests** – the ability for a customer to request a service (i.e., identify a pothole exists). The customer visits the Townships website to enter the complaint, the system would open up a service request and assign a work order to the relevant team. The customer would be notified, electronically when the request is closed.
Sample	https://forms.newtecumseth.ca/Report-a-Concern?Q1=By-Law%20Infraction
Options	• eForms Solution • SeeClickFix • PSD Citywide Citizen Request Portal
Short-Term	Implement online request feature with Citywide Citizen Request Portal to enable back office integration into the Town's work management system. The Township already subscribes to this part of the product but has not yet implemented the feature.
Long-Term	Include as part of the ERP solution, that allows the Township to do costing, and tie the purchase orders, time and materials to the work orders.

Service	**Complaint Tracking** – the ability for a customer to formally report a complaint, for the complaint to be investigated and managed through the process, and then be notified once their concern has been addressed.
Options	• eForms Solution (e.g. eSolutions Forms, FormsHero, JotForms, Microsoft Forms, etc.) • SharePoint Online List
Short-Term	Implement a simple online form for customers to submit requests and for requests to be tracked to resolution through a simple SharePoint Online list.
Long-Term	Include as part of the ERP solution.

Service	**Council Representation / Citizen Engagement** – the ability to seek online input and conduct engagement exercises online.
Options	• Bang the Table • Standalone surveys
Short-Term	n/a

Long-Term	The Township has selected, purchased and is in the process of implementing Bang the Table – a leading community engagement platform used by a large number of municipalities that can be used to run surveys, ideation and seek large scale community input on proposals.

Service	**Records Access** – the ability for a customer to submit and pay for an FOI request
Options	• eForms Solution + SharePoint Online • FOIP • Nordat • Workpro
Short-Term	An eForms Solution can be used to allow customers to be able to submit an inquiry and pay required fees. A simple SharePoint Online list can be used to track the handling of the Records Access request.
Long-Term	A more comprehensive solution designed for FOI request processing could be considered in the longer term, although the number of requests that the municipality handles may not warrant significant investment. Work focused upon improving the classification and management of documents and records will have a bigger impact on the Townships ability to respond to FOI inquiries.

Service	**Parking Passes** – the ability for customers to request and pay for parking passes
Sample	https://www.georgiancollege.ca/about-georgian/visit-us/parking/
Options	• eForms Solution • Gtechna • AIMS Parking sollution • TicketTracer • Honk • Parksmart/AutoProcess
Short-Term	A simple eForms solution would allow customers to request and pay online for a parking permit. Staff would process and mail or send via email a parking permit for the customer to print themselves.

Long-Term	A more comprehensive, integrated parking solution, that integrates ticket issuance and permits could be considered in the long term – potentially providing options for online payments of tickets, and a variety of other features.

Service	**Fire** – the ability to book a Fire Inspection
Sample	https://forms.guelph.ca/Emergency-Services/Fire-Code-Inspection-request
Options	• eForms Solution • Bookings - Office 365 solution • Appoint.io – eSolutions Booking solution • Accuity Scheduling • https://frontdesksuite.com/en
Short-Term	A simple implementation of the Office 365 bookings solution would allow customers to be able to book inspections online. This feature is included in the Townships existing Office 365 license and can be implemented quickly and easily. It could be used more broadly for bookings for other Township services and staff.
Long-Term	More sophisticated solutions, such as Appoint.io and Accuity scheduling may be investigated if additional features and capabilities are required in the longer term.

Service	**Fire** – the ability to request a burn permit
Sample	https://www.barrie.ca/Living/Emergency%20Services/BarrieFire/Inspections-Permits/Pages/Burn-Permits.aspx
Options	• eForms Solution • Work with the City of Barrie to leverage their Burn Permit solution
Short-Term	A simple implementation would use an eForms solution to provide the ability for citizens to apply / request a burn permit. The Township would process, issue the burn permit and send a notice to Barrie for updating in their systems.
Long-Term	Work with the City of Barrie to utilize the City's online Burn Permit feature.

Service	**Taxation** – the ability to view and pay property tax bills, change of ownership or mailing address, rebates and deferral programs, viewing history and supplementary tax bills and requesting a tax certificate.
Samples	https://guelph.ca/city-hall/budget-and-finance/property-taxes/bill-payments/ownershipchange/ https://guelph.ca/city-hall/budget-and-finance/property-taxes/tcol/
Options	• eForms Solution • Vendor Tax Self-Service module
Short-Term	A number of short-term eForms solutions could, in the short term, be implemented to support requests for certificates, address changes, PAP application, rebates and deferral programs.
Long-Term	Implementation of a vendor module of the core Tax system to support tax bill access, history and other self-service features is required. This is dependent upon a decision in regard to the Finance System – whether to upgrade or replace Vadim.

Service	**Arts and Cultural Grant Awarding** – the ability to offer an online application for grants, in-kind services, and partnerships to non-profit organizations through the Municipal Arts and Cultural Grants Program, such events, projects, festivals, and programs.
Options	• eForms • Grant Management solutions (e.g. Apply by SurveyMonkey, Amplifund, Submittable, WizeHive)
Short-Term	eSolutions eForms configured to handle the submission of various grants requirements (application details, attachments, etc.)
Long-Term	It is unlikely that the number of grants issued by the municipality would warrant a more comprehensive solution. Nonetheless, a dedicated Grant Management solution would handle the end-to-end process of receiving and evaluating applications, as well as the allocation and monitoring of grants.

Service	**Roadway Access** – the ability to apply for a road occupancy permit.
Options	• eForms • Citywide Permits
Sample	https://eforms.countyofessex.ca/Permits/Single-Trip-Permit?Id=4f309a70-50fd-4134-8e9a-ce47a63cc131
Short-Term	Implement an eForms Solution for the submission and payment for road occupancy permits, and other road-based permits (e.g., moving, superload permits, etc.)
Long-Term	Implement a solution that is integrated with the Townships work management and GIS solutions.

7.2. Customer Facing Solution Requirements

In addition to the solution approaches recommended here, some additional specifics about some of the recommended solutions is identified.

7.2.1. eForms Solution

In selecting and implementing an eForms solution the Township should be seeking a solution that can:

- Be easily configured by Township staff to support all standard form fields and question types
- Support logic and branching to allow questions to be presented only if a customer selects certain options
- Support standard data validations and data masks (email, phone, SIN, postcode, etc.)
- Support attachments
- Support database lookups
- Support systems integration via API
- Support payments integration
- Support digital signatures
- Support workflow configuration
- Support GIS / location integration
- AODA compliant

7.2.2. Bookings Solution

In selecting and implementing a booking solution the Township should be seeking a solution that can:

- Self-serve booking for customers – indicating available timeslots

- Self-serve cancel and modification of bookings
- Notifications and alerts to remind customers of appointments
- Allow customers to easily add appointments to their own calendar
- Simple administration to setup and modify appointment types, lengths, locations and services
- Configure information to collect from customers
- Integrate with Office 365 individual and group calendars
- AODA compliant

7.3. Business Solution Requirements

In addition to the solutions that will enable quick win online solutions, the Township must also set its business solutions foundations.

Our recommendations suggest that the Township focus on the implementation, re-implementation or evolution of the core business solutions that support:

- People and Money related processes
- Work and Asset related processes
- Land and Property related processes

7.4. Finance / ERP System Review and Potential Replacement

One of the most critical systems that the Township operates is the Finance and Tax system. This drives billing and collection of taxes, management of finance, payroll, etc.

The Township's current Finance system is Vadim. The version of the system is out-dated and an upgrade is required. However, because it has been so long since the last upgrade, a simple upgrade cannot be performed, and the solution must be migrated to a new version.

More broadly speaking, there are some concerns that the system is not meeting the needs of the Finance team and the organization as a whole. Thus, rather than continued investment in a system in which the Township has limited confidence, there is some consideration as to whether the solution should be replaced with a more comprehensive and complete solution.

To do so is, without a doubt a significant undertaking, from an effort and investment perspective. But this is also a strategic decision that manifests our earlier discussion of pursuing an integrated or best of breed strategy.

Options in the marketplace for a replacement, which have been somewhat limited by market consolidation, includes:

- Great Plains, Central Square (current provider or Vadim)
- Dynamics AX
- Townsuite

- Agresso, Unit 4

We recommend that the Township, through SMT, evaluate through demonstrations the options available in the marketplace and consider how it wants to set its business solutions strategy going forward.

7.4.1. Work and Asset Management

The Township's decision related to the Finance System replacement, will determine the future strategy regarding Citywide.

The Township has at this time implemented Citywide for some Asset and Work Management capabilities – but we understand some features have not been fully implemented and/or are not yet fully utilized.

If the Township makes a determination to move to an ERP solution, work and asset management should be included in this project. The ERP solutions capabilities should include work management, preventative maintenance, inspections, and route patrol, along with the Citizen Request Portal will be key to achieving the full value for the Townships investment and ongoing subscription.

7.4.2. Land and Property: Permitting, Licensing and Land System Implementation

Again, the Township's decision related to the Finance System replacement and the integrated strategy may determine the future strategy regarding Land and Property systems – as some of the integrated solutions offer planning and permitting capabilities.

The Township currently uses a dated Marmak solution for Building Permitting that simply does not offer the features of a modern permitting and planning solution. So, if the Township is to offer more modern, online enabled planning and permitting services, including inspections using technology – then a replacement system will be required.

Options in the marketplace for replacement of a permitting system for a municipality of Georgian Bay's size include:

- Townsuite
- Citywide Permitting Module
- CloudPermit
- Cityview

If the Township chooses to pursue replacement, the key features of such a solution should include the ability to:

- Track all development and permit types
- Track application and permit status and activities, including tracking dates, milestones, tasks and automate workflows
- Track people (e.g., owner, agent) related to the application

- Calculate and process fees
- GIS integration
- Document attachments (letters, agreements, scanned reports)
- Handle drawings, including drawing markup and versioning
- Provide online capabilities for applicant and public (application submission, tracking, payments)
- Mobile capabilities for inspectors to carry out inspections in the field

7.4.3. GIS Review / Migration

GIS is also a critical tool for the Township, which to date has used CGIS extensively – particularly within Planning. The Township also offers some public facing mapping services using CGIS. While CGIS is used by many smaller municipalities, there would be some significant benefits from an integration and a shared platform perspective if the Township were to move to a shared GIS platform utilizing the industry leading GIS platform from Esri – that is used by partners and the District.

There are many features that the Esri platform offers, which CGIS does not, including mobile GIS, field data collection and survey tools, data quality and automated data conversion, sophisticated analysis tools, and many other opportunities. Leveraging the work and knowledge of the municipal community where the Esri platform is dominant is another key value proposition.

It is recommended that the Township work with the District of Muskoka to explore the potential and evaluate options for moving to the Esri platform.

7.5. Additional Considerations

7.5.1. Policy Review

Some work will be required by staff to ensure that the Township's policies and practices support the implementation of technologies that are proposed.

Today, some bylaws and policies may actively prevent the adoption of online and digital services – as for example, the Town's purchasing bylaw previously prevented online bid submissions.

In practice, there are very few legislative limits preventing services from being handled digitally and most of the Townships services can be moved online without impediments.

Nonetheless, some existing bylaws, policies and work practices may need to be revised to ensure that applications can be received online, that physical signatures can be replaced with digital signatures, and that online approvals can satisfy requirements. This may also involve the creation of new policy – a digital signatures and electronic approvals policy, for instance – that broadly sets out when (most of the time) and how digital approvals can be used.

7.5.2. Process Work

Although many of the proposals here recommend replacing paper or adobe forms with online forms, simply digitizing a paper or adobe form is not considered a best practice.

Instead, the Township should take the opportunity to review and re-think each of the processes to see if there are any process improvements that can be made – whether a form should collect more or less information for instance, or if the information collected should be shared with additional people in the process. Looking at the needs of all of the stakeholders, asking the 5 why's, and considering the process from the customers point of view are all helpful ways to make sure any revised form meets all possible needs.

7.5.3. Resourcing Implementation Activities

As we have discussed earlier, Helix responsibilities end at the Infrastructure layer – leaving staff and the Director of Finance to figure out how to implement business solutions to meet requirements.

While vendors and partners can be contracted to implement some of the solutions that are identified here, buying and implementing systems is just the start of a journey with a product. There is strong value in having capabilities in house to implement and evolve business solutions, and to assist in the implementation and ongoing full utilization these and online solutions.

As a result, we would suggest that a Business System Specialist position is required to bridge the IT-Business gap and to help the Township begin to fully realize its vision of online services and digitized processes.

A Business System Specialist's primary role would be to support the departments in identifying business requirements for business solutions and technology related projects. They fulfill this by applying the principles of business analysis in the requirement gathering, planning and re-engineering of business processes and practices and convert these requirements into technology requirements that will be used by external vendors that are hired to implement the solutions.

This role takes a corporate view perspective for projects and ensures that they understand the landscape of the Township, and the requirements for each department. Having this holistic view and understanding of what is required for each department, they can determine if a solution already exists within the Township's technology, and if not can research the best solution that fits within the technology landscape. This is a critical piece to ensuring that systems are integrated, and that there is one version of the truth for data.

Another benefit of having a Business System Specialist position to coordinate and even build out forms is the cost savings. An average municipality has approximately 200 forms that they work with, and to digitize these forms would be costly if done by an outside vendor. For example, if it costs $2,500 per form, to build 200 forms would cost the municipality approximately $500,000. This would pay for a Business System

Specialist for the next 5 years, and this position would not only create forms, but they would do so much more for the Township including process improvements.

7.5.4. Leverage Strategic Partnerships

Looking forward there could be great value for the Township to have a closer connection and strong partnership with the District of Muskoka where there is an opportunity to share solutions (i.e. GIS), leverage shared service offerings and possibly reduce costs.

Regular conversations between the Township and the District of Muskoka would be beneficial. Working with purchasing and IT in the District of Muskoka and other municipalities in the District, may enable piggy backing on purchases and the ability to explore opportunities for joint or shared project implementations is another example where the Township could gain value through strategic partnership

In addition, the Township has established a strong working relationship with Helix. The Township should continue to nurture and grow the partnership, seeking opportunities for Helix to play a larger role in managing additional aspects of the technology environment.

8.0 Implementation Plan and Budget Implications

8.1. High Level View

The following timeline identifies the major and strategic activities that are recommended for the next two years. Additional smaller initiatives are planned – see the detailed work plan in Appendix A for more information.

Year	Implementation Activities
2021	Modernization • Implement Online Payments (including building permits, taxes, animal registration, fire burn permits, ticket – parking and other, and fines) • Work with PSD - Citywide Citizen Request Portal to implement Services Requests (creation of forms that send out a service request to the field workers) • Complaint Tracking – implement a simple online form for customers to submit requests and for request to be tracked to resolution through a simple SharePoint Online list • Council Representation / Citizen Engagement – implement Bang the Table to run surveys ideation and seek large scale community input on proposals • Records Access – an eForm solution can be used to allow customers to be able to submit and inquiry and pay required fees. • Parking Passes – the ability for customers to request and pay for parking passes could be accomplished by a simple eForm solution. • Fire – the ability to request a burn permit could be implemented through eForms • Taxation – a number of short-term eForms solutions could be implemented to support requests for certificates, address changes, PAP application, rebates and deferral programs. • Arts and Cultural Grant Awarding – eForms configured to handle the submission of various grans requirements. • Roadway Access – eForms solution for the submission and payment for road occupancy permits, and other road-based permits (ie. Moving, superload permits, etc.) Resourcing • Hire a Business System Specialist to bridge the IT-Business gap and to help the Township begin to fully realize its vision of online services and digitized processes.

2021 Cont'd	System Replacements • Finance / ERP System Review and Potential Replacement – requirements gathering and creation of RFP for replacement of Finance / ERP system. • Work and Asset Management: Citywide – review and potential replacement. • Replacement of Land & Property: Permitting, Licensing and Land System Implementation – Requirements gathering and creation of RFP for replacement of system ensuring integration with other core systems. Policy Review • Updating and creating policies and practices to support the implementation of technologies that are proposed. Process Work • Review each process, map the end-to-end processes associated with the key Business Systems that need to be replaced / updated and understand the needs of the municipality
2022	Modernization • Fire – the ability to book a Fire Inspection. A simple implementation of the Office 365 bookings solution would allow customers to be able to book inspections online. Leverage Strategic Partnerships • There could be great value for the Township to have a closer connection and strong partnership with the District of Muskoka where there is an opportunity to share solutions (i.e. GIS), leverage shared service offerings and possibly reduce costs. System Replacements • GIS Review / Migration – move to a solution that has features such as mobile GIS, field data collection and survey tools, data quality and automated data conversion, analysis tools and other opportunities. Recommendation is to work with the District of Muskoka to explore opportunities.

A more detailed work plan is included in Appendix A – Work Plan.

8.2. Budget Impacts

The work plan in Appendix A (which has also been provided to Township staff as a separate excel sheet) includes estimated costs for each individual initiative.

The cost estimates for each project are based on industry experience, and experiences in other similar sized municipalities. They provide an order of magnitude estimate for the Township to understand the scope of future expenditures associated with pursuing this strategy. In each case, a more detailed investigation of the marketplace before requesting budget should be conducted to validate the estimate accuracy and to refine budget requirements.

In total, the initiatives identified in the strategy require investment.

	Capital	**Operating**
Implementing Online Payments	$10,000	$1,500
Work Citywide to implement Services Requests	$20,000	$4,000
eForms • Complaint Tracking • Records Access • Parking Passes • Fire Burn Permits • Taxation • Arts and Cultural Grant Awarding • Roadway Access	$17,500	
Hire Business System Specialist		$70,000
Council Representation /Citizen Engagement – Bang the Table	$1,000	
System Replacements • Finance / ERP System Review and Potential • Work and Asset Management Review and Potential Replacement	$200,000	

• Replacement of Land & Property: Permitting, Licensing and Land System Implementation		
Total 2021	**$248,500**	**$75,500**
eForms - Fire Inspection	$2,500	
System Maintenance • Finance / ERP System Review and Potential • Work and Asset Management Review and Potential Replacement • Replacement of Land & Property: Permitting, Licensing and Land System Implementation System Replacement • GIS Review / Migration – opportunities	$15,000	$50,000
Total 2022	**$17,500**	**$50,000**

9.0 Conclusions and Major Recommendations

Through the development of the Modernization report, the Township's leadership has established a vision for the future which focuses upon delivering customer centred digital services. This is a profound change that is not just about technology. It is about a transformation in the way that the Township does business and delivers service, and a culture change in the way that the organization comes together to tackle technology enabled business initiatives.

First, the Township must focus on the customer experience and build the conditions necessary to manage and coordinate the technology program associated with the modernization of services. Following are the key recommendations to modernize the Township.

People – Ensuring the right people and partnerships are in place to build a robust technology ecosystem.

- Hire a new IT resource – Business System Specialist – to help build stronger business relationships between IT and the Township's business units and to help translate ideas into realistic and achievable projects.
- Leverage Helix (external IT service provider) to provide additional services and support to augment their infrastructure work and to assist the Township in planning and implementing technologies as part of a hybrid IT service delivery model.
- Build a stronger partnership with the District and leverage some of its solutions.
- Continue Senior Management Team (SMT) meetings to help prioritize technology projects on a go forward basis.

Process – Revising and re-designing processes before digitizing them will increase your opportunities for continuous improvement.

- Update policies and procedures to improve the rigour by which technology ideas are conceptualized, planned, funded and executed.
- Change policies to support digital approvals, signatures, submissions, and programs (e.g., Bids & Tenders).
- Map out the business processes to better understand the connections and dependencies between departments and processes.

Technology – Improving corporate coordination, planning around technology and improving outcomes of business technology projects.

- Commit to online services and ensure all new services are digitized. Online payments and registration of licenses, especially during COVID, have become more important to the Township. Online services include online payments and eForms to help manage processes such as Burn Permits, Fire Registration, Recreation Programs, Complaint Tracking, Records Access (FOI), Parking Passes, Taxation, Animal Licenses, Arts and Cultural Grant Awarding and Roadway Access. These are all done manually today and each of these represent strong candidates for online services.

- Implement Service Requests to increase response times for field workers. The Township has no service request management system in place. Users can send in complaints via the webform, but this simply generates an email and does not track complaints.
- Council Representation / Citizen Engagement – implement Bang the Table to run surveys ideation and seek large scale community input on proposals.

Finally, there are several gaps which are needed to underpin the delivery of online services. The Township must plan for a number of major business systems initiatives that will support the digitization of business processes in preparation for digital service delivery. Some of the most important initiatives include:

1. Finance / ERP System Review and Potential Replacement – requirements gathering and creation of an RFP for replacement of Finance / ERP system.
2. Work and Asset Management: Citywide – review and potential replacement of Citywide.
3. Replacement of Land & Property: Permitting, Licensing and Land Management System Implementation – requirements gathering and creation of an RFP for system replacement to ensure integration with other core systems.
4. GIS Review / Migration – move to a solution that has features such as mobile GIS, field data collection and survey tools, data quality and automated data conversion, analysis tools and other opportunities. Recommendation is to work with the District of Muskoka to explore opportunities.
5. Internet Connectivity - Finally, as with many rural communities, internet connectivity issues exist which hamper use and adoption of technology for residents, businesses and Township staff. The Township may want to consider investigating provincial funding opportunities for rural broadband.
6. Although not identified through the review process, Bids & Tenders software should be explored in order to eliminate the need for paper submissions.

It is important to ensure there is full integration between these systems, and that there is a well thought through strategy. Integration can occur in several ways, however, the most effective way is to implement a solution that allows for information to be shared between all components of the organization. This is considered an ERP or Enterprise Resource Planning system. Many of the short-term options identified will help the Township see the benefits of online services quickly, while also helping to determine the long-term processes. The best solutions are designed with the customer at the centre and designing the processes that meet the future demands and focus on the user experience, before selecting the corresponding technology.

9.1. Financial and Resource Commitment is Critical

The strategy identifies capital requirements of over $250K for the three years and operating expenditures will also be expected to increase by approximately the same amount in that time frame.

While it is acknowledged that this represents significant investment – there is a clear need for change. It is evident that the current technology environment is inhibiting effective government and meeting customer service expectations.

The Township's investments in the short-term and long-term technology recommended in this strategy will deliver tools and capabilities for optimizing service delivery and improving productivity, will create the foundations to radically improve the way that citizens interact with the Township – providing faster turnaround, reduced paper use and visits to Town Hall.

Implementing the recommendations will provide the foundations that are necessary to position the Township to deliver customer centred digital services.

10.0 Appendix A – Work Plan

The following table provides the details of the recommended initiatives, order of magnitude cost estimates, and suggested timing.

ID	Projects	Total Budget for 3 years	Operating Impacts	2021	2022	2023
	2021 Costs					
1	Purchase Online Services Program	$10,000	$1,500 / Year	$10,000	$1,500	$1,500
2	Service Requests - Create Forms in PSD system	$20,000		$20,000		
3	eForms Complaint Tracking, Records Access, Parking Passes, Fire Burn Permits, Taxation, Arts and Cultural Grant Awarding, Roadway Access)	$17,500		$17,500		

4	Hire Business System Specialist	$210,000	$70,000 / Year	$70,000	$70,000	$70,000
5	Bang the Table – Assistant in Set up	$1,000		$1,000		
6	System Replacements • Finance / ERP System Review and Potential • Work and Asset Management: Citywide Review and Potential Replacement • Replacement of Land & Property: Permitting, Licensing and Land System Implementation	$200,000		$200,000		
	2022 Costs					
7	eForms - Fire Inspection	$2,500		$2,500		
8	System Maintenance		$50,000 / Year		$50,000	$50,000

	• Finance / ERP System Review and Potential • Work and Asset Management: Citywide Review and Potential Replacement • Replacement of Land & Property: Permitting, Licensing and Land System Implementation					
9	System Replacements • GIS Review / Migration – opportunities	$15,000				