THE CORPORATION OF THE TOWNSHIP OF ESSA
VIRTUAL COMMITTEE OF THE WHOLE MEETING

WEDNESDAY, MARCH 3, 2021
6:00 p.m.

To view our live stream visit the Township of [Essa's YouTube Channel](#)

AGENDA

1. **OPENING OF MEETING BY THE MAYOR**

2. **DISCLOSURE OF PECUNIARY INTEREST**

3. **DELEGATIONS / PRESENTATIONS / PUBLIC MEETINGS**

p. 1   **a.**   **Presentation – Perry Group Consultants - Prasanna Gunasekera**
           Re: Information Technology and Digital Strategic Plan

STAFF REPORTS

4. **PLANNING AND DEVELOPMENT**

p. 38   **a.**   **Staff Report PD004-21 submitted by the Manager of Planning and Development, re: Proposed Telecommunications Tower, 5067 20th Sideroad, Xplornet Communications Inc.**

       Recommendation: *Be it resolved that Staff Report PD004-21 be received; and That Council approve endorsing the Letter of Concurrence for the proposed telecommunication tower to be located at 5067 20th Sideroad.*

p. 44   **b.**   **Staff Report PD005-21 submitted by the Manager of Planning and Development, re: Proposed Telecommunications Tower, 6004 Scotch Line, Xplornet Communications Inc.**

       Recommendation: *Be it resolved that Staff Report PD005-21 be received; and That Council approve endorsing the Letter of Concurrence for the proposed telecommunication tower to be located at 6004 Scotch Line.*

5. **PARKS AND RECREATION / COMMUNITY SERVICES**

6. **FIRE AND EMERGENCY SERVICES**

7.   PUBLIC WORKS

p. 50   **a.   Staff Report PW004-21 submitted by the Manager of Public Works, re: Thornton Water Tanks Expansion.**

Recommendation: *Be it resolved that Staff Report PW004-21 be received; and That Council authorize Staff to enter into a contract agreement with Greatario and approve OCWA's expenditure request for a total combined cost of $219,000.00 (excluding H.S.T.) to complete the Thornton Water Tanks Expansion project.*

8.   FINANCE

9.   CLERKS / BY-LAW ENFORCEMENT / IT

p.58   **a.   Staff Report C007-21 submitted by the Manager of Legislative Services, re: Information Technology and Digital Strategic Plan.**

Recommendation: *Be it resolved that Staff Report C007-21 be received; and That Council approve the Information Technology and Digital Strategy, in principle; and That Council support an application being submitted for funding through the Implementation Stream of the Municipal Modernization Funding Program, to assist with initial busines solution costs associated with modernization and upgrading Essa's IT systems; and That future operating and capital budget considerations be presented to Council for consideration in forthcoming Budget Deliberations.*

10.   CHIEF ADMINISTRATIVE OFFICER (C.A.O.)

p.134   **a. Staff Report CAO009-21 submitted by the Chief Administrative Officer, re: Strategic Plan Status Update.**

Recommendation*: Be it resolved that Staff Report CAO009-21 be received for information.*

11.   OTHER BUSINESS

12.   ADJOURNMENT

Recommendation: *Be it resolved that this meeting of Committee of the Whole of the Township of Essa adjourn at _____ p.m. to meet again on the 24th day of March, 2021 at 6:00 p.m.*

IT Digital Strategy

Council Presentation

March 3, 2021

Context

"There is no difference between digital service delivery and service delivery. Today, everything is digital. If governments do not recognize this evolution, then any service strategy is flawed at the concept stage"

Alex Benay, CIO Canada, 2017 - 2019

Agenda

1. Strategy Development Process
2. Current State IT/Digital Findings
3. Key Reasons for the Current State
4. IT and Digital Strategy (ITDS)
5. ITDS Key Recommendations
    1. Benefits of Using Technology
    2. ITDS Recommendations
6. Implementing the ITDS
7. Questions

1. Strategy Development Process

Essa IT Digital strategy

IT Digital Strategy Work Plan

Phase	Activities
Discovery Nov - Jan	✓ Background data review ✓ Conduct the online staff survey ✓ IT Manager / Clerk Lead interview ✓ Technology review w/ IT staff ✓ Business Interviews with Township Departments, including CAO and other key roles ✓ Compile findings results, identify opportunities ✓ Review key findings with Leads / SMT
Analyze / Strategize Jan - Mar	✓ Develop Strategy and Plan ✓ Meetings and round tables to determine future strategic directions (specific topics TBD) ✓ Identify implications of future directions (e.g. staffing/organization, resourcing, governance) ✓ Review future directions and implications with Township leads and incorporate feedback ✓ Develop implementation plan ✓ Prepare draft written strategy, including goals, activities and success measures ✓ Submit and review draft strategy with Clerk and IT Manager ✓ Submit and review draft strategy with SMT ✓ Prepare and present IT Digital Strategy to Council

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2. Current State IT / Digital Findings

Essa IT Digital strategy

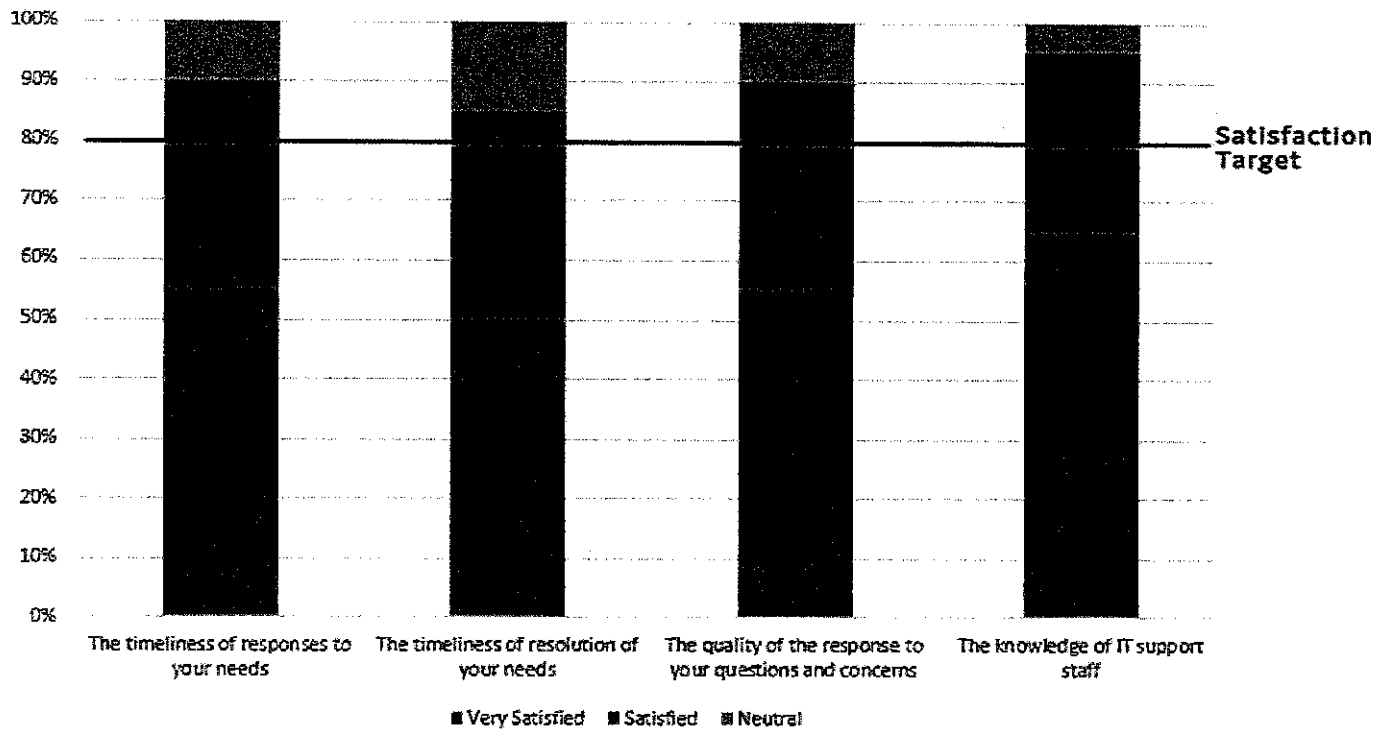# Key Positives

1. Management and staff are keen to use more technology
2. IT support services are rated high by staff based on the staff survey
3. Shared services with Innisfil IT, County a smart move
4. Existing technology environment has many positives: MOAR, GP, Lifecycle management practices, virtual server environment etc.

Survey Results
21 responses

**~ 85% of respondents are satisfied or very satisfied with IT at the Township.**

100%
90%
80% ························· **Satisfaction Target**
70%
60%
50%
40%
30%
20%
10%
0%

The timeliness of responses to your needs | The timeliness of resolution of your needs | The quality of the response to your questions and concerns | The knowledge of IT support staff

■ Very Satisfied ■ Satisfied ■ Neutral

Key Challenges

- Customer digital needs are increasing
  - Online, anywhere/anytime
  - Essa should pivot from over-the-counter antiquated channels to digital service delivery
- Customers demand a high level of service experience
  - Like Netflix, Amazon, Online banking, provincial and federal online services (Plate renewal, CERB, Income Tax etc.)
  - Essa should satisfy the customer demands based on their needs
- Internal systems are key to external services
  - Customer facing systems should integrate with internal systems for seamless and efficient service delivery
  - Essa should increase internal process automation
- The digital divide is real
- Historically, technological change in Essa has been lagging
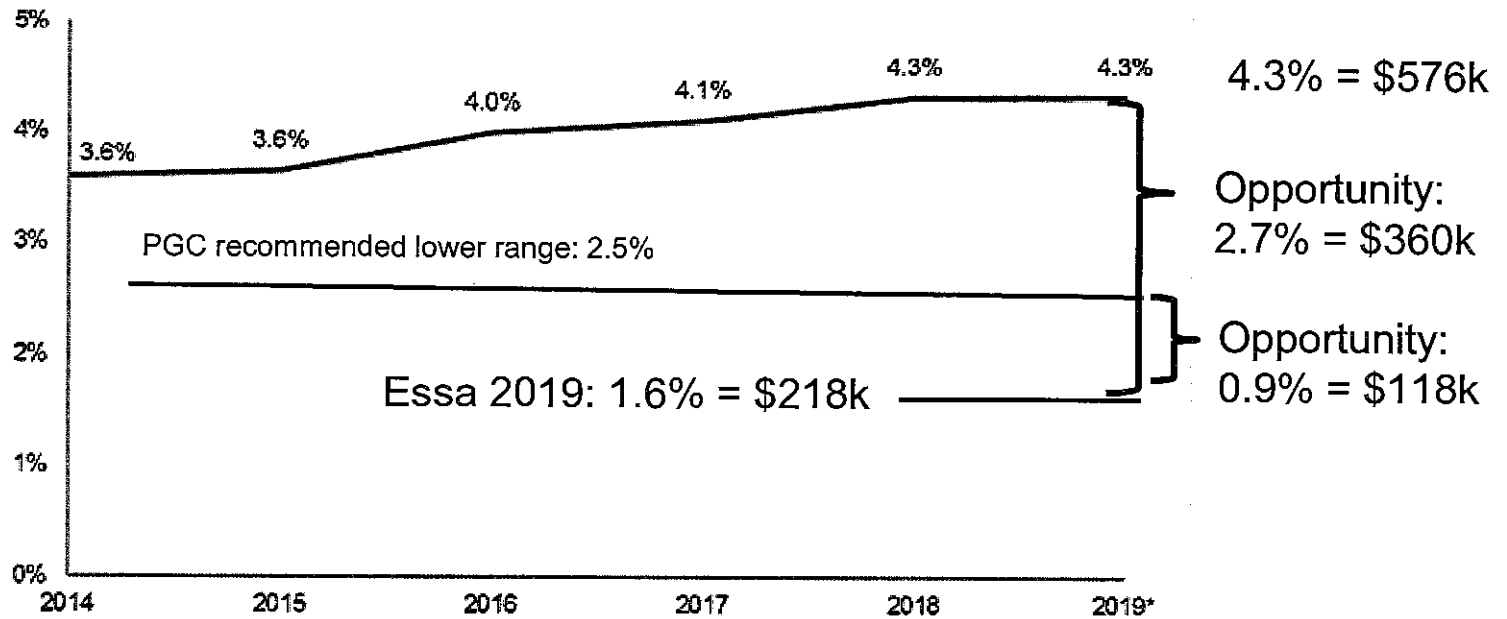
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Investment in Technology

The Township operates below the Perry Group recommended budget range. **Innovation aspirations will be enabled through higher levels of spending and staffing**.

IT Operating Expenditures

PG Suggested Range

| 0% | 2.5% | 4.5% | 6% |

**Essa
1.6%**
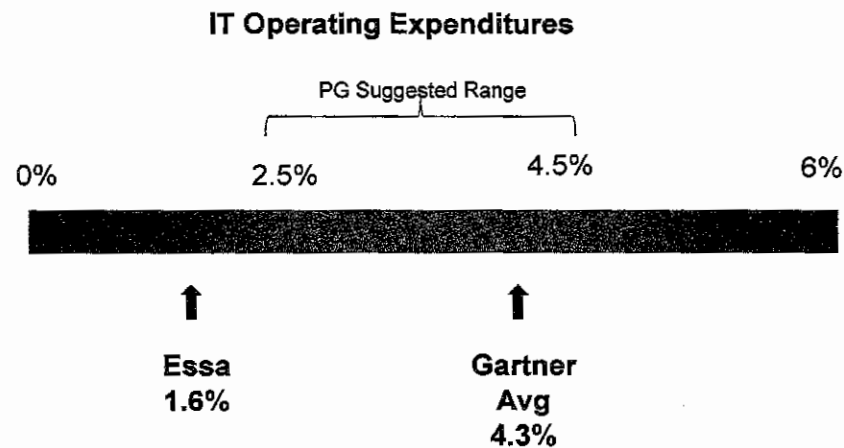
**Gartner
Avg
4.3%**

IT Budget Analysis

IT Spending as a Percent of Operating Expense

Government - State and Local

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12

```
5% |
    |                                              4.3%        4.3%      4.3% = $576k
    |                               4.1%
4%  |              4.0%
    | 3.6%   3.6%                                                        Opportunity:
3%  |           PGC recommended lower range: 2.5%                        2.7% = $360k
    |
2%  |                                                                    Opportunity:
    |           Essa 2019: 1.6% = $218k                                  0.9% = $118k
1%  |
    |
0% |_____
    2014      2015      2016      2017      2018      2019*
```

* Projected figure, based upon projected 2019 IT spending provided by Gartner clients.
ID: 375611

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Technology Governance

Suitable structures and processes for optimizing and aligning decision making

- Distributed technology decision making
- Unstructured technology investment planning
- No IT steering committee
- Inconsistent identification, evaluation and coordination of technology opportunities
- IT not part of technology decisions

3a

5. IT and Digital Strategy (ITDS)

Essa IT Digital strategy

01/25/2020

5.1. Benefits of Using Technology

Essa IT Digital strategy

01/25/2020

Benefits of Using Technology

- Enables excellent customer service
  - Digital channel provides convenience to residents, anytime, anywhere
- Improves customer engagement
  - Social media, online surveys, virtual meetings etc.
- Improves the service delivery timelines
  - Better turnaround times due to automation
  - Less duplicate data entry dues to integrated systems
- Addresses resident concerns in a timely manner
  - Automated status updates to applications, concerns, complaints
- Helps the environment
  - Paperless process reduces the amount of paper (E.g. Tax bills)

Benefits of Using Technology

- Reduces the service delivery cost
  - Online service cost is lower than over-the-counter or over-the-phone

	Cost per Transaction (Service Canada)
Web / Online	$0.10
Phone	$4.00
Face-to-Face	$6.50

4000 % savings

Reference: Anywhere, Anytime, Any Device: Innovations in Public Sector Self-Service Delivery Research Report by Kenneth Kernaghan Brock University 2012

Benefits of Using Technology

- Creates capacity
  - Automation reduces the need for manual processing by staff
- Increases Transparency
  - Digitization allows the Township to collect and share data with public, Council and management
- Reduces the number of complaints received by the Council
  - Digital business processes can provide automated status updates to customers (E.g. Planning applications, property complaints, Snow issues)
- Helps make informed decisions
  - Data analytics allow Council and Management to make decisions based on evidence, data and trends
- Increases the accessibility and availability of services
  - Driving to a Township office is not required, out-of-town/seasonal/out of town workers/ residents are served
- Delivers the Essa Corporate Strategic Plan 2019-2022

Alignment with the Corporate Strategic Plan 2019- 2022

Goal 3: Customer Service Excellence

Desired Outcomes:

- ✓ To enhance our customer service so that residents feel well-informed
- ✓ To ensure that we are known to be friendly and helpful
- ✓ Easy to access information
- ✓ More/better use of technology
- ✓ Improved communications with easy-to-read newsletters and publications

Alignment with the Corporate Strategic Plan 2019- 2022

Goal 4: Good Governance

Desired Outcomes:

- ✓ To find efficiencies in service delivery to ensure optimal effectiveness
- ✓ To streamline processes
- ✓ To eliminate duplication
- ✓ To ensure that the municipality is responsible and accountable to its taxpayers
- ✓ Partnerships to cost-share in service delivery

5.2. ITDS Recommendations

Essa IT Digital strategy

3a

ITDS Recommendations – Customer Facing

Aligned with business needs and Corporate Strategic Plan

1. Digital Services	2. Digital Communications and Community Engagement
• Online applications • Online payments • Online billing • Online status checks	• Online surveys • Digital news and event communication • Social media for communications

ITDS Recommendations – Internal Facing

3. Digital Business Processes

- Paperless processes
- Digital approvals
- Digital workflow
- Integrated business processes

4. Digital Awareness

- Technology training
- Increase digital knowledge
- Digital skills

5. Broadband Internet Access and Connectivity

- Consistent access from all Township locations
- Mobile computing access
- High-speed internet to residents

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6. Implementing the ITDS

Essa IT Digital strategy

Repositioning IT

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

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

Keep the lights on: The IT organization is expected to provide cost effective reliability with transparent costs.
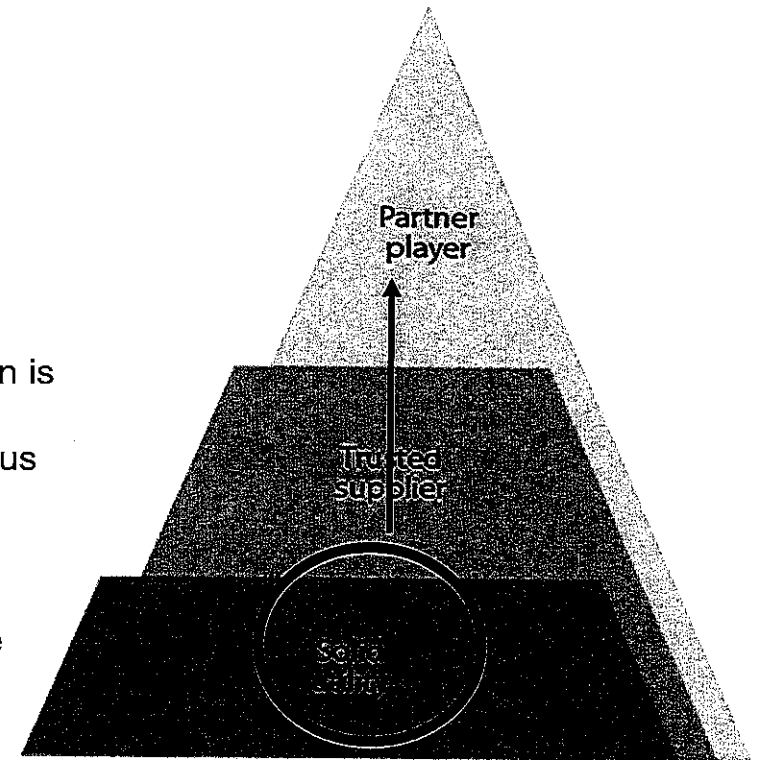
Technology Governance

- Senior Management Team to act as the Digital Steering Committee (DSC)
  - Priority setting & investment choices
  - Track key project status and resolve conflicts
  - Monitor the implementation of ITDS
- Seat at the table
  - IT Manager is invited to SMT
- Cohesive and consolidated Technology investment
  - IT is part of identifying business requirement
  - IT Help prepare budgets
  - Centralized IT budget

Technology Investment – Current State

- Current annual IT budget: $218,000 provides the following
  - **Infrastructure:** Computers, laptops, servers, phones, printers
  - **Connectivity:** Network, wi-fi, security
  - **Business Systems:** GreatPlains, MOAR, MaxGalaxy, FireHouse, MESH, HRDownloads, Terraview, Safety Hub, RexRoth, Infoeit etc.
  - **Productivity Tools:** Email, Calendar, TEAMS, Microsoft Office: Word/Excel etc.

Technology Investment – Current State

- Current annual IT budget: $218,000 avoids the following
- Resources required to:
  - Manual paper-based communications with residents (5 additional FTE)
  - Manual paper-based business processes: accounting, payroll, Budgeting, council agenda/minutes/reports (20 additional FTE)
  - Face-to-face service delivery (5 additional FTE)
- Cost avoidance:
  - 30 * $100,000 = $3,000,000

Technology Investment - Recommendation

- Increase investment levels to the PG recommended minimum
- Recommend an infusion of $118,000 to the IT Operating budget

IT Operating Expenditures

PG Suggested Range

| 0% | 2.5% | 4.5% | 6% |

↑ Essa 1.6%   ↑ Gartner Avg 4.3%

Target 2.5% →

IT Operating Expenditures

PG Suggested Range

| 0% | 2.5% | 4.5% | 6% |
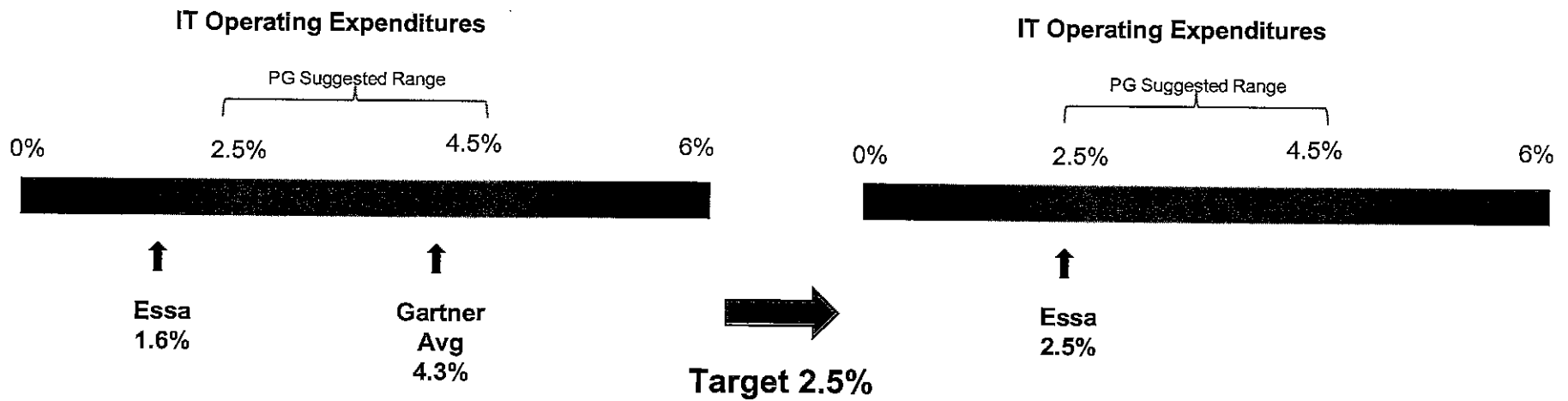
↑ Essa 2.5%

Technology Investment - Recommendation

- Short Term: Increase technology investment to the Perry Group minimum recommended level (2.5%)
  - Operating budget increase of $118,000 (moving forward annual operating increase)
- Long Term: Plan to reach 3.5% of Total Operating in 5 year
  - $25,000 – $30,000 increase to annual operating budget each year
- Make use of provincial grants: E.g. Phase 2 of the Municipal Modernization fund

Technology Investment - Recommendation

- Examples of what you can do with an additional $118,000
    - Electronic property tax billing for residents
    - Online building permit applications, inspection requests
    - Online payments for services

  OR

    - Council agenda and meeting management system
    - An Integrated asset and work order management system
    - Disaster Recovery and a Business Continuity plan
    - A new website and a community engagement platform

- OR, many other combinations of digital improvement recommendations to be prioritized by the Township

Recommendations: 25 High Priority items

- Stable network and internet connectivity to all Township offices
- Develop and implement a Digital Awareness program
- Integrated Asset and Work Management System implementation
- Update and/or replacement the recreation program system
- Council agenda management system
- Parking ticket management system
- Road Permits system
- Automate mobile inspections for building inspections
- Customer calls tracking system

- Integrated Fire reporting using GIS spatial analysis
- Ability to update GIS data by staff
- Integration of GIS with property information in multiple system
- Accounts Payable process digitation
- Automate the capital project reporting with PO commitments
- Improve the office productivity tools through upgrade
- Online Community Engagement platform
- Enhance Social Media presence

- Website upgrade/replacement
- Burn Permit request automation
- Online Tax, Utility Billing, MyAccount/eBill
- Online Building Permits
- Online Service Orders
- Enable online payments through the Township website
- Increase video surveilence to limit vandalism and damage to Township owned property
- Disaster Recovery Plan
- Business Continuity Plan

Recommendations : 11 Medium Priority items

- MOAR training

- GIS training

- GreatPlains training

- HR Self-service through staff app

- Animal Licensing automation

- Automate By-law complaints tracking process including mobile inspections and orders.

- Records and Document management system

- Update Zoning information on GIS maps including self-service zoning reports for public

- Online Planning Applications
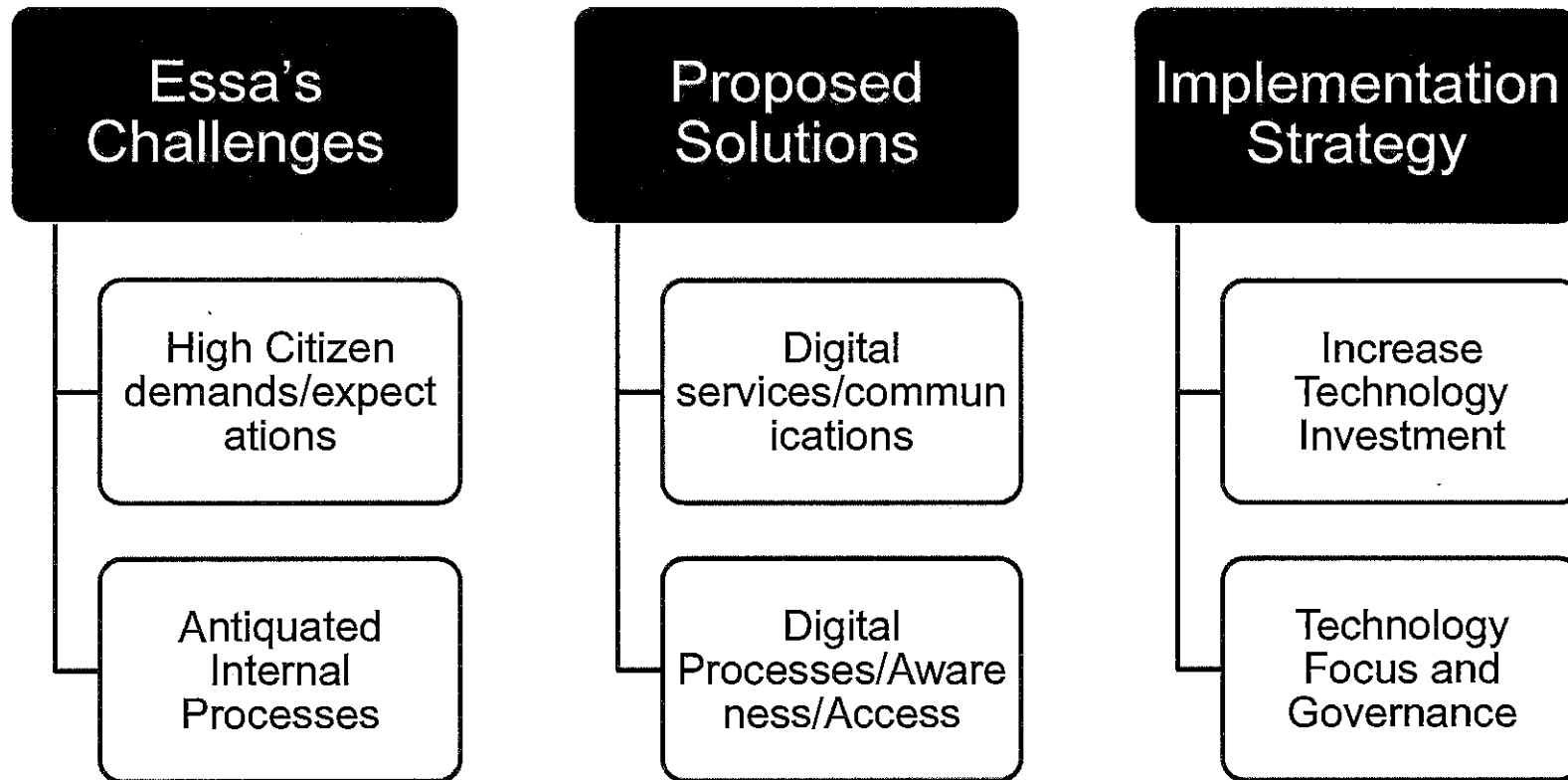
- Online By-law complaints

- Convert static forms to fillable online forms

Recommendations : 8 Low Priority items

- Provide MOAR specific capabilities awareness

- Mobile forms automation. E.g. Fire department

- Electronic plans review

- Implement the Interactive Ontario Building code software for inspectors

- Burn Permit request automation

- Automate the DC charges calculation

- Business Licensing process automation

- GIS collector apps for asset related field data capture

To Summarize

Essa's Challenges	Proposed Solutions	Implementation Strategy
High Citizen demands/expectations	Digital services/communications	Increase Technology Investment
Antiquated Internal Processes	Digital Processes/Awareness/Access	Technology Focus and Governance

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36
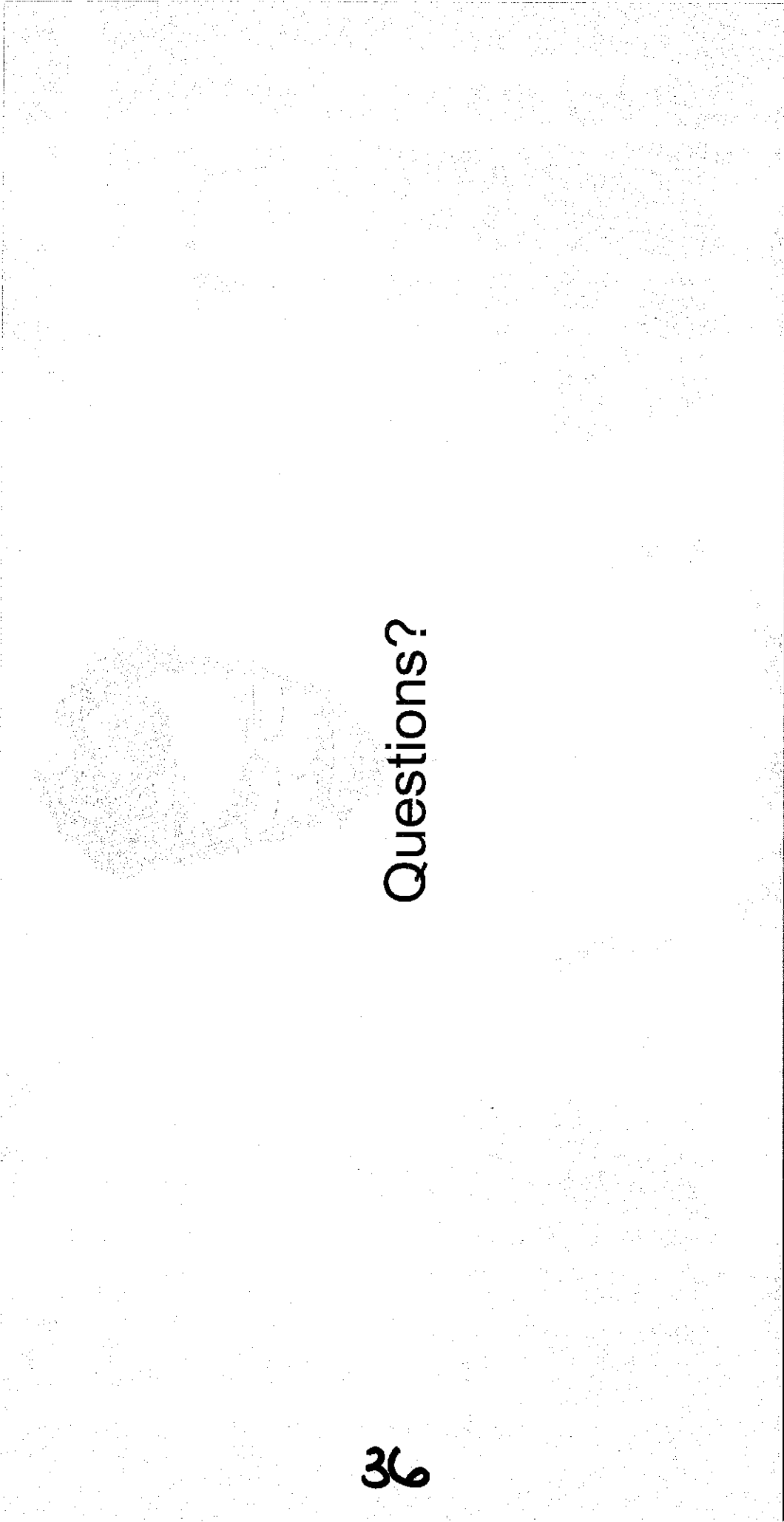
Questions?

Our Contact Details

37

Ben Perry
ben.perry@perrygroupconsulting.ca
647-669-9540

Prasanna Gunasekera
Prasanna.gunasekera@perrygroupconsulting.ca
647-217-6723

TOWNSHIP OF ESSA STAFF REPORT

STAFF REPORT NO.:   PD004-21

DATE: March 3rd, 2021

TO: Committee of the Whole

FROM: Aimee Powell, B.URPI., MPA, MCIP, RPP
Manager of Planning & Development

SUBJECT: Proposed Telecommunication Tower, 5067 20th Sideroad,
Xplornet Communications Inc.

RECOMMENDATION

That Staff Report PD004-21 be received for information purposes; and

That Council consider endorsing the Letter of Concurrence for the proposed telecommunication tower to be located at 5067 20th Sideroad.

BACKGROUND

The Township has been notified by Xplornet Communications Inc. that a proposed 45m lite-duty, self support lattice tower (the Tower) is to be located at 5067 20th Sideroad, in the southwest corner of the subject site (See Attachment "A"). The proposed tower has a face width of 2.75m at the base and tapers to 1m at the top. Radio equipment is installed on the upper portion of the Tower that will provide wireless internet services to Xplornet customers in the community. An equipment cabinet is installed at the base of the Tower to process the radio equipment. The Tower will have an anti-climb installation on the base, and the base will remain natural. Any requirements for an approved entrance and/or NVCA permissions will be sought out by Xplornet Communications Inc.

The purpose of the installation of the Tower is to improve wireless internet services to those in the immediate area of Thornton, more specific those who are Xplornet customers. As per the *Department of Innovation, Science and Economic Development Canada (ISED)* protocol, for public consultation on the installation of Telecommunication Towers, the applicant must consult with the local municipality, as well as the public. The applicant has informed this office that public consultation took place via mail-out to neighbours within a radius of 135 m, as per *ISED standards* under the *Radiocommunication Act*, as well as through an advertisement in the Borden Citizen (currently online publication) and Alliston Herald. Under this protocol, the applicant is to address all reasonable and relevant concerns, make all reasonable efforts to resolve them in a mutually acceptable manner and must keep a record of all associated communications.

COMMENTS AND CONSIDERATIONS

ISEDC is responsible for regulating radio and telecommunication in Canada and for authorizing the location of the telecommunication facilities. Companies wishing to provide for the subject infrastructure are required to consult with Navigation Canada, Transport Canada, and the municipality prior to erecting communication towers, but the municipality is not the approval authority.

The municipality's concerns are taken into consideration, and the licensing process will be delayed for negotiations if the Municipality does not support the application. If the applicant for the Telecommunication Tower cannot reach an agreement with the land-use authority, ISEDC will decide on the appropriate course of action, using the information provided by both parties.

Furthermore, Planning Staff would like to identify that ISEDC, has stated all antenna towers have to satisfy all technical requirements and comply with *Health Canada's Safety Code 6*, which imposes strict limits on the radio frequency energy sent out by any antenna tower. Health Canada continues to monitor all domestic and international scientific evidence on radiofrequency, electric magnetic fields (EMF) and health. If new scientific evidence were to show that exposure to radiofrequency EMF at levels below the Canadian limits is a health concern, they would take action to protect all our health and safety.

Through the consultation process, the proponent must seek a letter of concurrence from the local municipality. It is expected that following the consultation process, the municipality would supply the required letter once Council and staff have reviewed any concerns, ensuring their resolution. (See Attachment "B" for the proposed Letter of Concurrence).
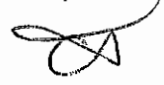
According to the Township's Zoning By-law, By-law 2003-50, the subject land is zoned as Institutional (I) Zone (See Attachment "C") and the Official Plan designates the lands, as Institutional. The Township's Official Plan does not restrict telecommunication towers in Institutional designations. Further, this use would be permissible in accordance with the Township's Zoning By-law which stipulates per Section 4.12d) that "Nothing in this By-law shall prevent the use of any land for the erection or use of any building or structure for the purpose of a public service by the Corporation of the Township of Essa, any telephone or communications company", provided that a municipality provides a letter of concurrence in accordance with federal requirements.

The Applicant is also entertaining moving the proposed tower to the Essa Agriplex at 7505 10th Line - currently under review from their engineering/agency staff – this is also contingent on the approval of both parties on location and agreement terms. In the event the location changes we would present another report to Council for the proposed new location. Currently, Staff do not object to the proposed use and recommend Council to endorse the attached Letter of Concurrence for the property at 5067 20th Sideroad.

4c

PD004-21
Proposed Telecommunication Tower, 067 20ᵗʰ Sideroad, Xplornet
Communications Inc.

Page 3 of 3

FINANCIAL IMPACT

The proponent has provided the required fee in the amount of $1,000.00 for a request of this nature. There are no costs associated with this request to the municipality.

SUMMARY/OPTIONS

Council may:

1. Take no further action.
2. Direct staff to provide the endorsed the Letter of Concurrence for the proposed telecommunication tower to be located at 5067 20ᵗʰ Sideroad.
3. Direct staff as Council may wish.
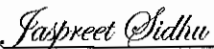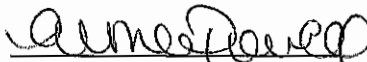
CONCLUSION

Option #2 is recommended.

Respectfully prepared: Respectfully submitted: Reviewed by:

Jaspreet Sidhu

Jaspreet Sidhu   Aimee Powell, B.URPI, MPA, MCIP, RPP   Colleen Healey – Dowdall
Planner   Manager of Planning   CAO
                 & Development

Attachment:

Attachment "A" –Site Sketch and Photo Rendering
Attachment "B" – Concurrence Letter
Attachment "C" – Zoning Map

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Attachment "A " - Site Sketch and Photo Rendering
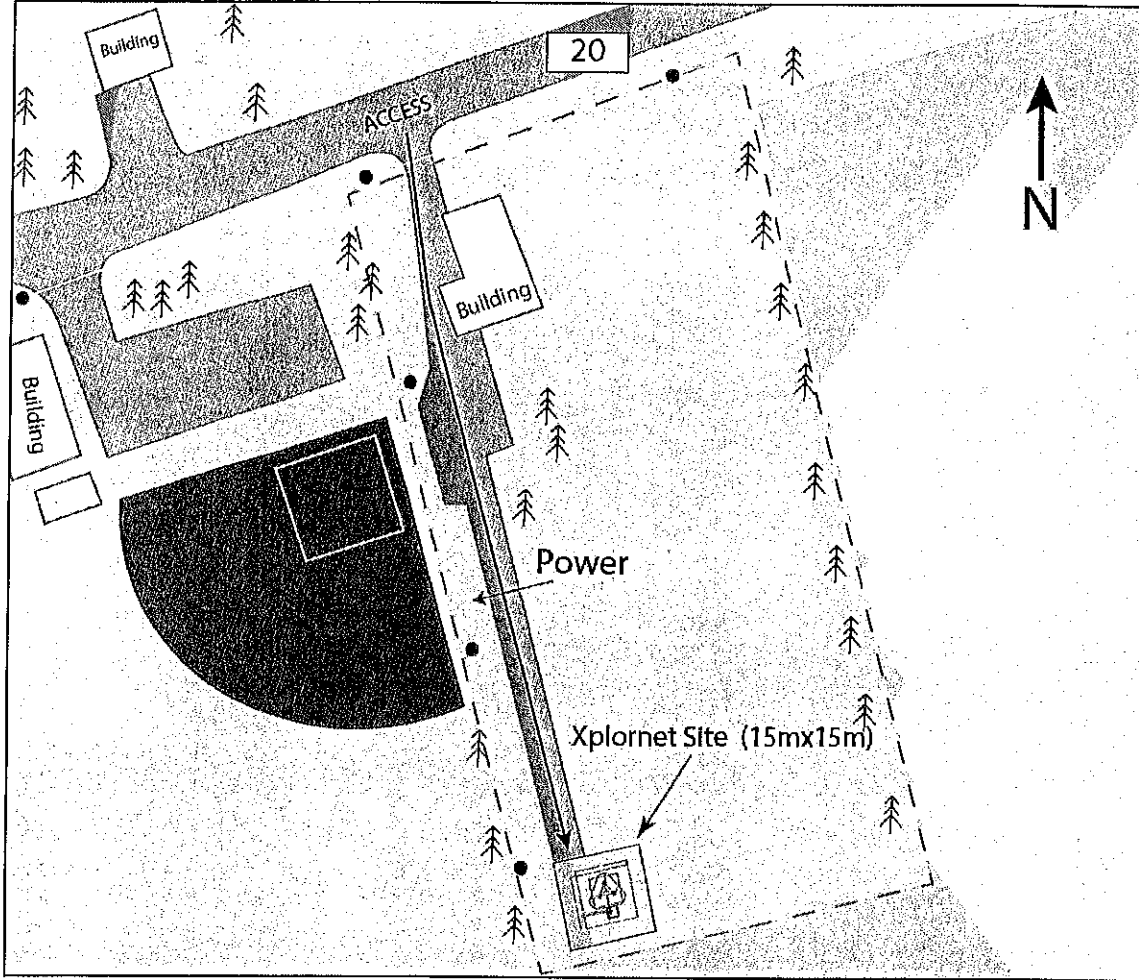
<u>Site Sketch:</u>

<u>Photo Rendering:</u>

Photo Rendering of the Proposed 45m Lite-Duty Self-Support Lattice Tower

41

4a

Corporation of the Township of Essa
5786 County Road 21
Utopia, Ontario
LOM 1T0

Township of Essa
Where Town and Country Meet

Telephone: (705) 424-9770
Fax: (705) 424-2367
Web Site: www.essatownship.on.ca

ATTACHMENT 'B'

March 03 2021

Jay Lewis, Real Estates &
Municipal Affairs
FB CONECT A FORBES BROS
COMPNAY
482 South Service Road E, Suite
130, Oakville, ON, L6J 2X6

Dear Sir:

**Re: Proposed Telecommunications Installation by
XPLORNET at 5067 20th Sideroad, Roll # 010-003-14500-0000
Letter of Concurrence**

Further to consultation with the Township of Essa by FB Connect a Forbes Bros
Company on behalf of Xplornet, regarding Part Lot 20, Conc 9, Township of Essa,
this will confirm that following a complete review of all documentation, the Township
of Essa provides this Letter of Concurrence for provision in accordance with the
Radiocommunications Act and Innovation, Science and Economic Development
Canada procedure on Telecommunications (as per Guideline CPC-2-0-03),
provided that Forbes Bros Company on behalf of Xplornet, obtains the proper
building permit and Nottawasaga Valley Conservation Authority (NVCA) permit
following approval and as well, agrees to provide the Municipality with dedicated
space on the telecommunications tower should the Municipality, including its Fire
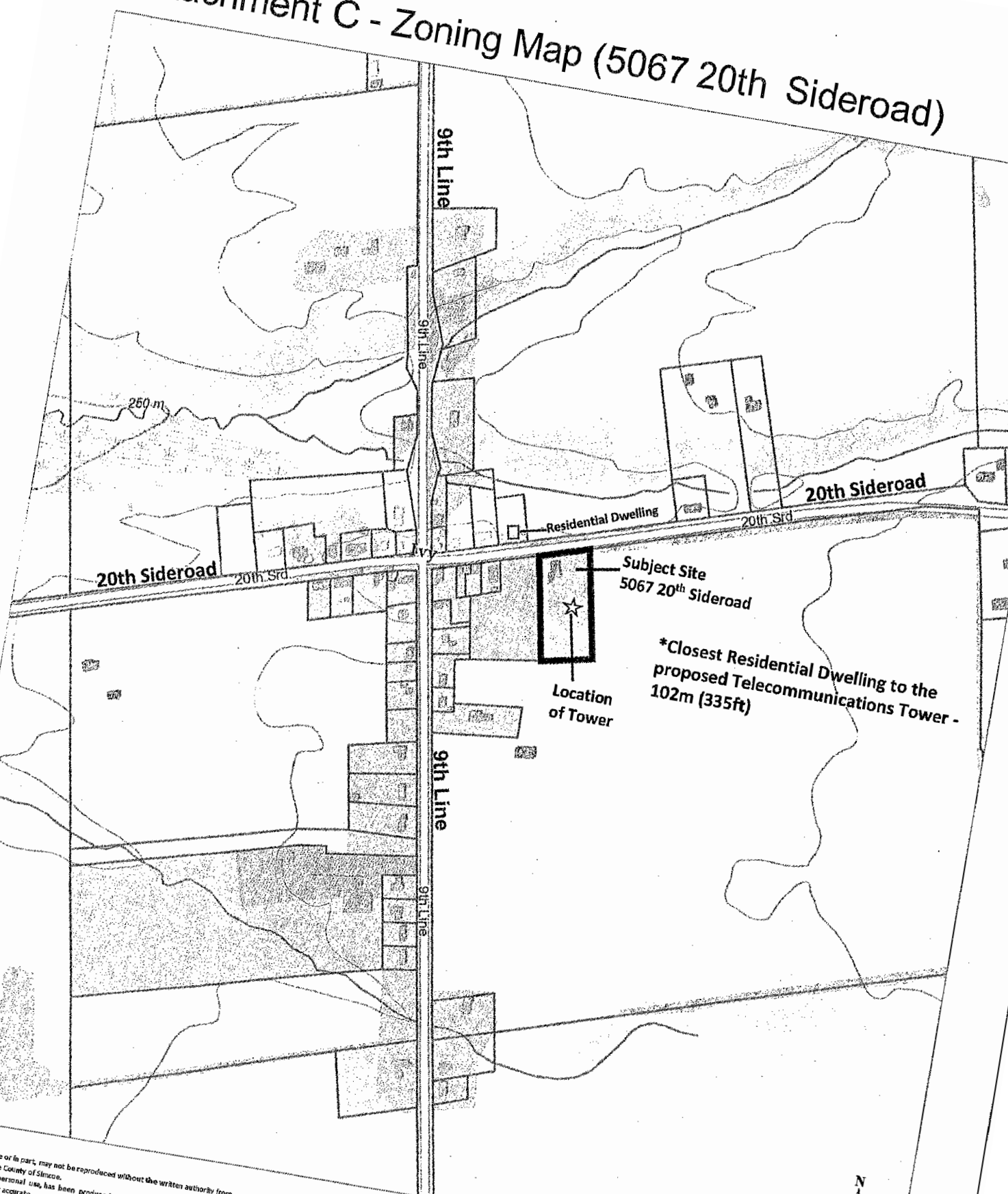Department, require space in the future.

*Please note that any building erected shall be designed and maintained in general
harmony with the buildings or structures permitted in the Institutional zone (per
Sec 4.12d)3).*

I trust the above is satisfactory, however, should you have any questions, please
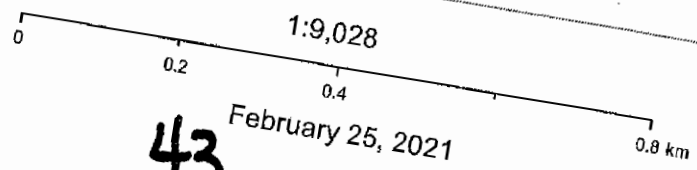do not hesitate to call.

Sincerly,

Jaspreet Sidhu
Planner

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Attachment C - Zoning Map (5067 20th Sideroad)

9th Line

9th Line

250 m

Residential Dwelling

20th Siderod

20th Sideroad

20th Siderord

Ivy

20th Siderord

Subject Site
5067 20th Sideroad

*Closest Residential Dwelling to the
proposed Telecommunications Tower -
102m (335ft)

Location
of Tower

9th Line

9th Line

1:9,028

0   0.2   0.4   0.8 km

N
W   E
S

February 25, 2021

43

TOWNSHIP of ESSA

TOWNSHIP OF ESSA STAFF REPORT

STAFF REPORT NO.: **PD005-21**

DATE: **March 3rd, 2021**

TO: **Committee of the Whole**

FROM: **Aimee Powell, B.URPI., MPA, MCIP, RPP**
Manager of Planning & Development

SUBJECT: **Proposed Telecommunication Tower, 6004 Scotch Line,**
Xplornet Communications Inc.

RECOMMENDATION

That Staff Report PD005-21 be received for information purposes; and

That Council consider endorsing the Letter of Concurrence for the proposed telecommunication tower to be located at 6004 Scotch Line.

BACKGROUND

The Township has been notified by Xplornet Communications Inc. that a proposed 45m lite-duty, self support lattice tower is to be located at 6004 Scotch Line, in the western corner of the subject site (See Attachment "A"). Radio equipment is installed on the upper portion of the Tower that will provide wireless internet services to Xplornet customers in the community. An equipment cabinet is installed at the base of the Tower to process the radio equipment, with a leasehold area of 15.0m X 15.0m. The Tower will have an anti-climb installation on the base, and the base will remain natural. Any requirements for an approved entrance and/or NVCA permissions will be sought out by Xplornet Communications Inc.

The purpose of the installation of the Tower is to improve wireless internet services to those in the immediate area of Alliston, more specific those who are Xplornet customers. As per the *Department of Innovation, Science and Economic Development Canada (ISED)* protocol, for public consultation on the installation of Telecommunication Towers, the applicant must consult with the local municipality, as well as the public. The applicant has informed this office that public consultation took place via mail-out to neighbours within a radius of 135 m, as per *ISED standards* under the *Radiocommunication Act*, as well as placed an advertisement in the Borden Citizen (currently online publication) and Alliston Herald. Under this protocol, the applicant is to address all reasonable and relevant concerns, make all reasonable efforts to resolve them in a mutually acceptable manner and must keep a record of all associated communications.

4b

COMMENTS AND CONSIDERATIONS

ISEDC is responsible for regulating radio and telecommunication in Canada and for authorizing the location of the telecommunication facilities. Companies are required to consult with Navigation Canada, Transport Canada, and the municipality prior to erecting communication towers, but the municipality is not the approval authority.

The municipality's concerns are taken into consideration, and the licensing process will be delayed for negotiations if the municipality does not support the application. If the applicant for the Telecommunication Tower cannot reach an agreement with the land-use authority, ISEDC will decide on the appropriate course of action, using the information provided by both parties.

Furthermore, Planning Staff would like to identify that ISEDC, has stated all antenna towers have to satisfy all technical requirements and comply with *Health Canada's Safety Code 6*, which imposes strict limits on the radio frequency energy sent out by any antenna tower. Health Canada continues to monitor all domestic and international scientific evidence on radiofrequency, electric magnetic fields (EMF) and health. If new scientific evidence were to show that exposure to radiofrequency EMF at levels below the Canadian limits is a health concern, they would take action to protect all our health and safety.
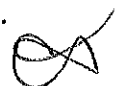
Through the consultation process, the proponent must seek a letter of concurrence from the local municipality. It is expected that following the consultation process, the municipality would supply the required letter once Council and staff have reviewed any concerns, ensuring their resolution. (See Attachment "B" – Concurrence Letter).

According to the Township's Zoning By-law, By-law 2003-50, the subject land is zoned as Agricultural (A) Zone (See Attachment "C") and the Official Plan designates the lands, as Agricultural. The Township's Official Plan does not restrict telecommunication towers in Agricultural designations. Further this use would be permissible in accordance with the Township's Zoning By-law which stipulates per Section 4.12d) that "Nothing in this By-law shall prevent the use of any land for the erection or use of any building or structure for the purpose of a public service by the Corporation of the Township of Essa, any telephone or communications company", provided that a municipality provides a letter of concurrence in accordance with federal requirements.

Currently, Staff do not object to the proposed use and recommend Council to endorse the attached Letter of Concurrence for the property at 6004 Scotch Line.

FINANCIAL IMPACT

The proponent has provided the required fee in the amount of $1,000.00 for a request of this nature. There are no costs associated with this request to the municipality.

PD005-21
Proposed Telecommunication Tower, 6004 Scotch Line, Xplornet
Communications Inc.

Page 3 of 3

4b

SUMMARY/OPTIONS

Council may:

1. Take no further action.
2. Direct staff to provide the endorsed Letter of Concurrence correspondence to the applicant for 6004 Scotch Line.
3. Direct staff as Council may wish.

CONCLUSION

Option #2 is recommended.

Respectfully prepared: Respectfully submitted: Reviewed by:

Jaspreet Sidhu

Jaspreet Sidhu
Planner

Aimee Powell, B.URPI, MPA, MCIP, RPP
Manager of Planning
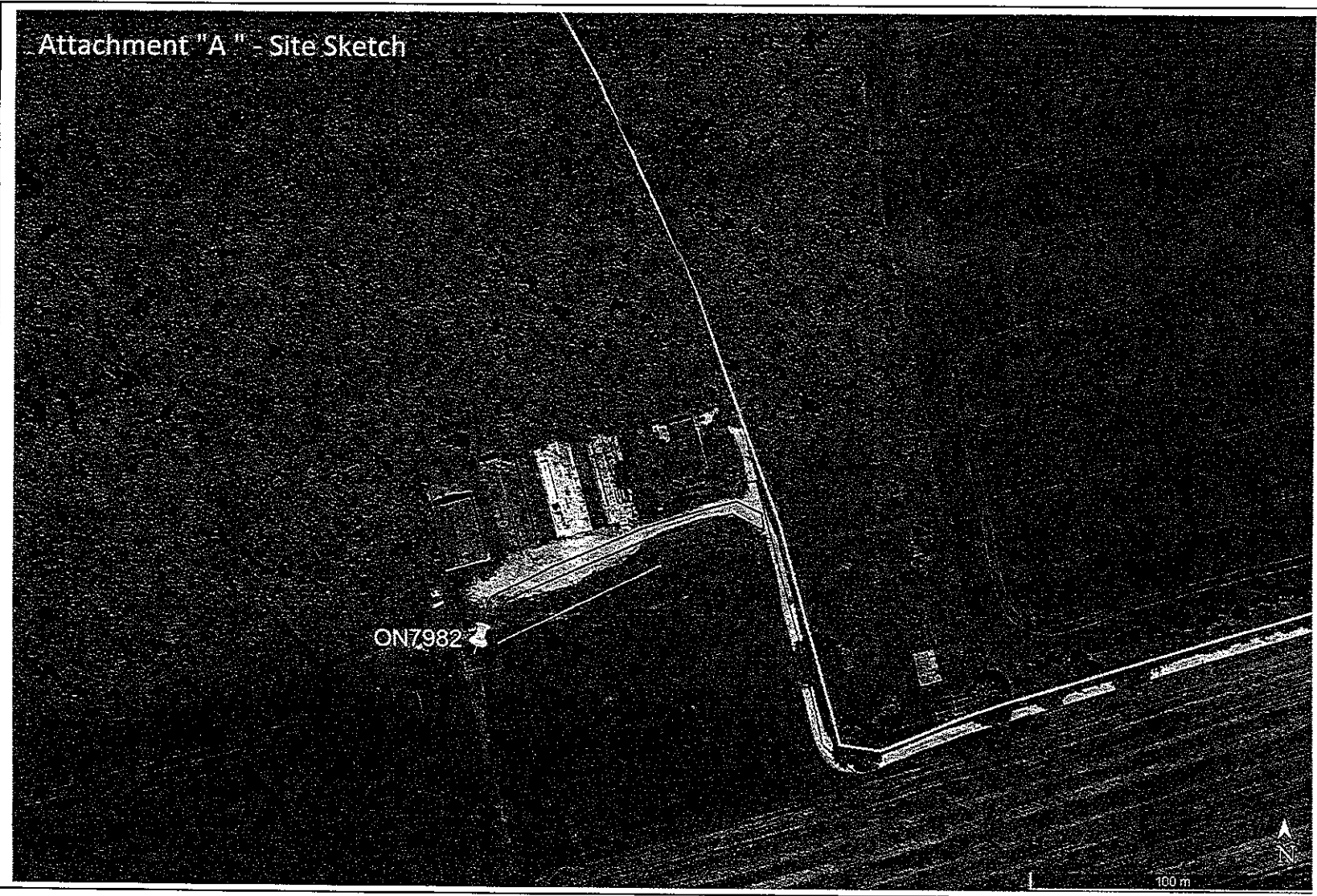& Development

Colleen Healey – Dowdall
CAO

Attachment:

Attachment "A" - Site Sketch and Photo Rendering
Attachment "B" - Concurrence Letter
Attachment "C" – Zoning Map

Attachment "A " - Site Sketch

ON7982

XPLORNET

SITE SKETCH
PROPOSED XPLORNET TOWER INSTALLTION
6004 SCOTCH LINE
PART OF LOT 9 CONCESSION 1
TOWNSHIP OF ESSA

SITE CODE: ON7982

LATITUDE: 44.20033
LONGITUDE: -79.88252

DESIGN: SELF-SUPPORT (STEEL
LATTICE) TOWER 45M HEIGHT

LEGEND:

☐   PROPERTY BOUNDARY

☐   ACCESS / LEASEHOLD

☐   POWER

100 m

Corporation of the Township of Essa
5786 County Road 21
Utopia, Ontario
LOM 1T0

TOWNSHIP of ESSA

Where Town and Country Meet

Telephone: (705) 424-9770
Fax: (705) 424-2367
Web Site: www.essatownship.on.ca

ATTACHMENT 'B'

March 03 2021

Sean Ogilvie, PMP, Real Estates
& Government Affairs
FB CONECT A FORBES BROS
COMPNAY
482 South Service Road E, Suite
130, Oakville, ON, L6J 2X6

Dear Sir:

Re: **Proposed Telecommunications Installation by**
XPLORNET at 6004 Scotch Line, Roll # 010-001-03001- 0000,
Letter of Concurrence

Further to consultation with the Township of Essa by FB Connect a Forbes Bros
Company on behalf of Xplornet, regarding Part Lot 9, Conc. 1, RP51R9079,
Township of Essa, this will confirm that following a complete review of all
documentation, the Township of Essa provides this Letter of Concurrence for
provision in accordance with the Radiocommunications Act and Innovation, Science
and Economic Development Canada procedure on Telecommunications (as per
Guideline CPC-2-0-03), provided that Forbes Bros Company on behalf of Xplornet,
obtains the proper building permit following approval and as well, agrees to provide
the Municipality with dedicated space on the telecommunications tower should the
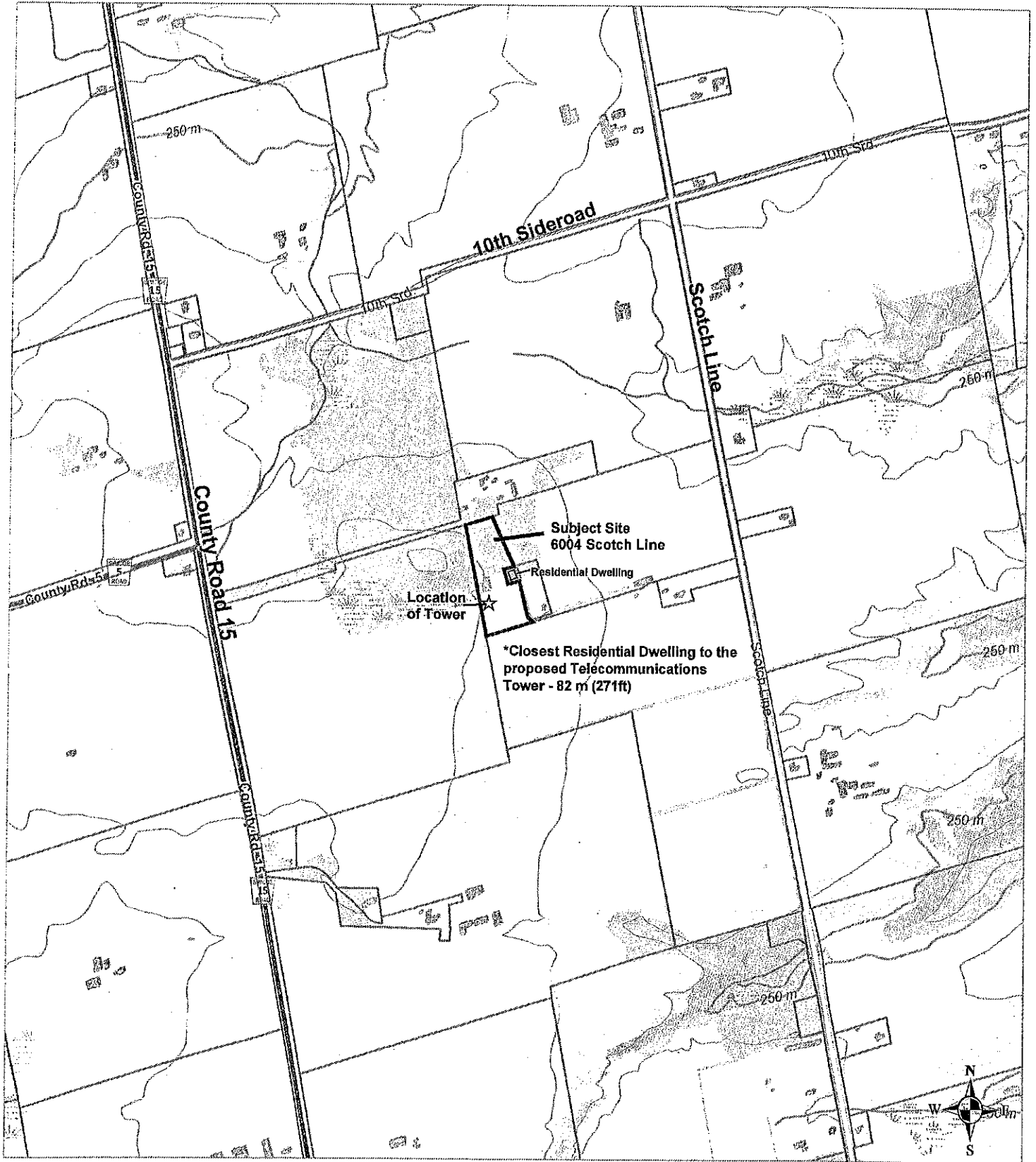Municipality, including its Fire Department, require space in the future.

*Please note that any building erected shall be designed and maintained in general
harmony with the buildings or structures permitted in the Institutional zone (per Sec
4.12d)3).*

I trust the above is satisfactory, however, should you have any questions, please do
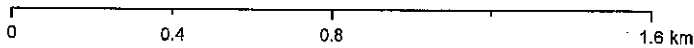not hesitate to call.

Sincerely,

Jaspreet Sidhu
Planner

4b

Attachment C - Zoning Map (6004 Scotch Line)

Subject Site
6004 Scotch Line

Residential Dwelling

Location
of Tower

*Closest Residential Dwelling to the
proposed Telecommunications
Tower - 82 m (271ft)

10th Sideroad

Scotch Line

County Road 15

250 m

1:18,056

| 0 | 0.4 | 0.8 | 1.6 km |

February 25, 2021

49

TOWNSHIP of ESSA
Where Town and Country Meet

TOWNSHIP OF ESSA STAFF REPORT

STAFF REPORT NO.: **PW004-21**

DATE: March 3, 2021

TO: Committee of the Whole

FROM: Michael Mikael, P.Eng., Manager of Public Works

SUBJECT: **Thornton Water Tanks Expansion**

RECOMMENDATION

That Staff Report PW004-21 be received; and

That Council authorize Staff to enter into a contract agreement with Greatario and approve OCWA's expenditure request for a total combined cost of $219,000 (excluding HST) to complete the Thornton Water Tanks Expansion project.

BACKGROUND

The Giulam development at the south end of Thornton was required to front-end water system upgrades in the amount of $645,000, of which the pump station upgrades were completed back in 2018 and the water tanks capacity increases are anticipated to be completed this year. The Giulam 2017 signed front – ending / financial contribution agreement included the following water system upgrades and associated preliminary cost estimates:

System Improvement	Estimated Cost	Project Status
Upgrades to Existing Wells and Equipment to maximise capacity	$40,000	Completed
New production well: includes Hydrogeological report for MOECC and application for the well, pump, connection to storage tank and engineering	$300,000	Not completed
Schedule B Class Environmental Assessment	$30,000	Not completed
Additional Storage in each of the existing standpipes including new level sensors	$165,000	To be completed in 2021
Increase High Lift Pump Capacity	$80,000	Completed
Changes in the distribution system to improve fire protection	$30,000	Not completed
Total Cost Estimates	**$645,000**	

This project includes the expansion of both existing standpipes in Thornton by adding a ring to each of the existing tanks and the design and construction of a valve chamber for a pressure transducer to improve water level measurement and well pump control.

7a

The expansion will increase the combined storage capacity of both tanks by 197 m3/day which will support/improve the municipal water supply in Thornton.

The proposed expansion will improve fire flow/storage and provide equalization to meet MCEP guidelines and shall provide more stability in the overall operation and less restriction during summer months based on the Capacity review report prepared by Ainley Group (dated March 3, 2017).

Staff is also working on addressing the pressure issue that was noticed last year during the summer peak months in Thornton by installing pressure reducing valves (PRV's) at the entrance to the Davis Trail development on Kallen BLVD which would alleviate the pressure issues. This will provide an adulate equalization as well to Thornton drinking water system. Project will be presented to Council during the 2022 budget time after monitoring the pressure in Thornton closely during summer 2021.

COMMENTS AND CONSIDERATIONS

In 2020 Greatario provided an overall cost estimate to complete the project in the amount of $257,000 excluding applicable taxes. In 2021 Staff negotiated the overall cost with Greatario. Public Works offered to assist Greatario by utilizing our heavy equipment machines for earth work and our purchased new survey equipment as required. The negotiation resulted in an overall cost of $212,000 ($45,000 in cost reduction) excluding applicable taxes as per the attachments.

OCWA will cover the procurement of the new pressure transducers, wiring, floats and programming to be completed at the reservoirs and pump house in Thornton for total cost of $7,000 excluding applicable taxes as per the attachments. The project is being carried out as a design-build contract. Public Works will provide administration for the entire project in house and carry out the required inspection.

FINANCIAL IMPACT

Originally the front ending agreement slotted $165,000 in development charges to fund this project, the Township will fund the entire project cost of $219,000 plus applicable taxes through the Giulam development charges with respect to section 11.2 of the signed Giulam 2017 front – ending / financial contribution agreement which allows for cost inflation.

There will be **no financial impact** on the Township since the entire project will be funded through development charges.

SUMMARY / OPTIONS

Council may

1. Take no further action
2. Authorize Staff to enter into a contract agreement with Greatario and approve OCWA's expenditure request for a total combined cost of $219,000 (excluding HST) to complete the Thornton Water Tanks Expansion project
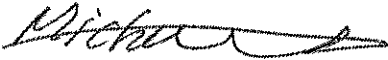3. Direct Staff to pursue researching other solution(s)

7a

CONCLUSION

Staff recommends that **option 2** be approved.

Respectfully submitted,

Reviewed by,

_____
Michael Mikael, P.Eng
Manager of Public Works

_____
Colleen Healey-Dowdall
Chief Administrative Officer

Attachments:
1. Project Final Cost Estimate
2. Greatario 2021 Final Quote
3. OCWA Expenditure Request

52

TOWNSHIP of ESSA
Where Town and Country Meet

Estimate _____ **Final Project Cost** _____

PROJECT **Thornton Standpipe Expansion**

CONTRACT ITEMS					SUMMARY	
Bid Item No.	Description	Unit of Measure	Source	Unit Price	Quantities	Amount
1	Greatario Quote	L.S.	Quoted	$ 212,000.00	1	$ 212,000.00
2	ACWO Expenditure Request	L.S.	Quoted	$ 7,000.00	1	$ 7,000.00
Notes: *Public Works will adminstarte the project in house*					**SUBTOTAL**	$219,000.00
					Contingency (5%)	$0.00
					Engineering (15%)	$0.00
					TOTAL Cost (Excluding HST)	**$219,000.00**

A-1
Expenditure Request and Approval to Proceed

ONTARIO CLEAN WATER AGENCY
AGENCE ONTARIENNE DES EAUX

Georgian Bay Highlands
30 Woodland Drive
Wasaga Beach, ON L9Z 2V4
Phone: 705-429-2525   Fax: 705-429-7967

PART 1

Facility Name:	Thornton DWS
Project Name:	Pressure Transducers, Wiring and Programming for Standpipe extensions
Project Number:	ESSAXN6066-W0

Estimated Project Start Date:	April – November 2021

Total Estimated Cost of the Project: $7,000.00	**Detailed Quote Attached:** ☐ Yes No

It is recognized that this is a budget estimate and the final price may vary. OCWA will provide additional justification where the final invoice price varies from the estimate by more than 10%

Type of Project:

X Maintenance   ☐ Out of Scope Work   ☐ Contingency   ☐ Emergency
☐ Health & Safety

Description of Project or Expenditure:

This expenditure request is for the procurement of new pressure transducers, wiring, floats and programming to be completed at the reservoirs and pump house in Thornton.

Submission Prepared By:

Mark Yandt		February 16 , 2021
Name (Print)	Signature	Date

Authorized Representative for the Ontario Clean water Agency

PART 2

Approval to Proceed:

☐ Approved   ☐ Declined   ☐ Deferred   Reason if Declined or Deferred

The Ontario Clean Water Agency is authorized to proceed with the project/expenditure according to the description and cost estimate provided above. This may include but not limited to the hiring of sub-contractors, consulting firms, etc. as required. The Municipality agrees to pay OCWA the costs associated with this work upon its completion based on the terms of the Municipality's agreement with OCWA.

Approved By:

Michael Mikael		
Name (Print)	Signature	Date

Authorized Representative

Township of Essa

5786 Simcoe County Road 21

Utopia, Ontario

L0M 1T0

PART 3

OCWA Internal Use Only:	
Client PO / Project #:	Date:
Project Start Date:	Project Completion Date:
OCWA Invoice #	Date:
OCWA Account Code:	OCWA Work Order #

54

7a

Western Canada
Suite 300
3665 Kingsway
Vancouver, BC V5R 5W2

GREATARIO

(866) 299-3009 | GREATARIO.COM

Eastern Canada
PO Box 399
715647 Oxford Road 4
Innerkip, ON N0J 1M0

ESSA – Thornton Water Tank Expansion   Feb 16 2021

PROJECT INFORMATION

To: **Michael Mikael**, P.Eng
Manager of Public Works
Township of Essa
mmikael@essatownship.on.ca
705-424-9917 ext. 135

Re: **Municipal Water Storage Tank Expansion**

Updated firm price for a Municipal Potable water storage tank expansion as described. Greatario would provide structural P. Eng stamped engineering design, supply and installation of all materials. Including tank, starter sheets, extensions for ladder and pipes, earthworks, concrete foundation changes and P. Eng stamped design.

MATERIAL SCOPE OF WORK <u>Quantity 2</u> Tanks –

Removal of obsolete tank components and modification to the existing tank size by adding 5' feet (1.524m) of additional potable water storage on each tank.

(1) Sidewall Ring Assembly Kit for Glass 97/Forest Green - Sidewall Ring
(1) Sidewall Sheet Replacement Glass 97/Forest Green - Shell Manway
Replacement (1) R-Plate, Gasket and Hardware for 24" Shell Manway (reuse existing weld-neck and cover)
(1) Steel Floor Foundation Ring Assembly Glass 97/Forest Green - (3 Anchor Chair Pchg.)

7a

(22) Anchor Bolt Chairs and
(22) ¾" Dia. Anchor Bolts – (268656-006) (Field Drilled and Installed in existing foundation.) All hardware and Manus sealer is included for expansion.
This will convert the existing tank to a **3134 SFWT Glassed** Aquastore® tank.

Design / Build Price: $212,000+ HST

Price Includes *additions 2020:
1. ON P.Eng. stamped structural submittal for tank and foundation.
2. Freight to site of included equipment
3. All construction on site, project management, tank testing and commissioning by Greatario (water supply by others).
4. Updated design to OBC 2020* including
   a. Excavation and backfill * Excavate appropriate extent beyond tank diameter
   b. Foundation modification, drilling dowelling of wall, forming and placing concrete footing. *
   c. Replacing required starter and sidewall sheets. *
   d. Replacement of all tank anchors as required by design. New anchors into existing concrete ring wall foundation. *
5. Truck unloading, (maximum 10,000 lb skids) and supervision by Greatario.
6. Greatario standard payment terms.
7. Insulated manhole installation.*
8. 2 Service lines, tied into existing watermain.*
9. Electrical conduit to juction box.*
10. 110V & 220V, 60AMP electric power service.*
11. Provision of Essa Twp. back-hoe or excavator for earthworks and supply/placement of A gravel for backfill under supervision of Greatario.

Price Does Not Include:
1. Provide and maintain a level compacted gravel pad at grade within 4m of tank for construction purposes.
2. Mechanical or electrical.
3. Soils and concrete testing.
4. Bonding.
5. Taxes, permits, fees.
6. Water supply and disposal to fill tank for testing purposes (water fill by others).
7. Winter construction.

56

7a

Thank you again for allowing us the opportunity to quote.

Sincerely,

Jeff Rodger
Greatario Engineered Storage Systems

TOWNSHIP OF ESSA STAFF REPORT

STAFF REPORT NO.: C007-21

DATE: March 3, 2021

TO: Committee of the Whole

FROM: Lisa Lehr, Manager of Legislative Services

SUBJECT: Information Technology and Digital Strategy

RECOMMENDATION

That Staff Report C007-21 be received; and
That Council approve the Information Technology and Digital Strategy, in principle; and
That Council support an application being submitted for funding through the
Implementation Stream of the Municipal Modernization Funding Program, to assist with
initial busines solution costs associated with modernization and upgrading Essa's IT
systems; and .
That future operating and capital budget considerations be presented to Council for
consideration in forthcoming Budget Deliberations.

BACKGROUND

During 2020 Budget Deliberations, Council approved funding to allow staff to hire a
consultant to prepare an IT Digital Strategy. Perry Group Consulting was the firm hired
in 2020 to analyze the current IT structure for Essa Township and to develop the IT
Digital Strategy. The consultant commenced gathering information in the fourth quarter .
of 2020.

Given the importance of technology and data, the IT Digital Strategy (Attachment No. 1)
was approached as a corporate initiative. The following is a breakdown of steps taken
to assist Perry Group in the development of the Strategy:

- A survey was circulated to all staff seeking input on current and future digital
  service needs.
- Perry Group conducted one-on-one interviews with each department manager
  including Planning and Development, Public Works, CAO's office, Parks and
  Recreation, Treasury and Clerks, with additional input from the Town of Innisfil's
  IT Manager.
- A current state assessment was conducted by Perry Group Consulting (this
  involved assessments of current technologies and practices against municipal
  standards).
- The Senior Management Team was provided further opportunity to provide
  feedback during the drafting stage of the Plan.

The objective of the Strategy is to assist the municipality in identifying key digital
opportunities that can be implemented by the Township, with the desired outcome being

to achieve customer service excellence by adopting current digital services and the efficiencies that go along with it.

COMMENTS AND CONSIDERATIONS

Municipalities are faced with significant challenges to stretch resources in order to deliver high quality customer service that meets the expectations of its residents, manage and sustain new and aging assets, and effectively engage citizens in decisions related to the building of the community. Effective municipalities rely on a combination of people, processes and technology working together in a synchronized way to deliver services to customers. A digitized platform is a set of processes and technologies that work together to enable customers to interact with the Township, and to enable Township staff to manage processes and deliver Township services to its customers in an efficient, effective and accessible manner 24 hours/day 7 days/week. The IT Digital Strategy (as attached) is the map that will assist this municipality in moving forward in respect of its digital and technology platform.

Benefits associated with implementation of the IT Digital Strategy are as follows:

- Enables excellent customer service
- Improves customer engagement
- Improves service delivery timelines
- Less duplicate data entry due to integration of systems
- Addresses resident concerns in a timely manner
- Helps the environment
- Reduces service delivery costs
- Creates capacity
- Increases transparency
- Reduces the number of complaints received by the Council
- Helps make informed decisions
- Increases accessibility and availability of services
- Helps deliver the Essa Corporate Strategic Plan 2019-2022 in the following manner:
  - o Customer service excellence:
    - o Enhance our customer service so that residents feel well-informed;
    - o Ensure that we are known to be friendly and helpful
    - o Provide easy and 24/7 access to information and services
    - o Provide more and better use of technology
    - o Improve communications with easy-to-read publications.
  - o Establish a new governance model that will support IT decision making that is reflective of corporate priorities by:
    - o Improve process efficiency
    - o Provide cost-effective services
    - o Uplift the level of digitization within the Township.

Through the development of the IT Digital Strategy, Perry Group sought to understand the current state of technology, technology capabilities, and the Township's ability to meet customer expectations. The strategy identifies some key challenges faced by the municipality, such as:

59

- Gaps in customer facing online services (ie: online payments, online applications, etc.)
- Gaps in data analytics, integration and business intelligence capabilities
- Many business areas are still depending on manual processes
- Technology decision-making that is distributed and ad-hoc
- Technology funding

In order to bridge these gaps and meet customer and corporate needs based on pressures and technological expectations in today's society, the IT Digital Strategy has focused on five focus areas (refer to section 8 of the IT Digital Strategy). Additionally, the Strategy has outlined key technological and digital opportunities (refer to section 10 of the IT Digital Strategy) that will assist this municipality in upgrading and modernizing its delivery of IT services as follows:

a. **Digital Services** (customer facing) – will provide residents the ability to request, receive and pay for services online anytime from anywhere.
b. **Digital Communications and Community Engagement** (customer facing) – building digital channels of communications with residents (ie: use of the website and social media to connect with residents in 2-way communications in a cost-effective manner).
c. **Digital Business Processes** (internal facing) – will reduce the administrative burden in business processes through automation. This will improve the efficiency of internal processes through digital workflows, approvals, etc., and will integrate with the customer-facing online services.
d. **Digital Awareness** (internal and customer facing) – will improve the digital awareness among leadership, staff and citizens through awareness campaigns and training opportunities.
e. **Broadband Internet Access and Connectivity** (internal and customer facing) – will improve connectivity between various municipal buildings and improve access to high-speed internet to residents in rural communities in Essa Township.

To assist with implementation of the IT Digital Strategy, the consultant has recommended the Township consider making the following internal changes in processes:

Reposition IT (refer to section 9.1 of the Strategy) – As Innisfil provides IT Support to Essa, it is recommended that Innisfil take on more of an IT partner from the existing service provider role.

Governance (refer to section 9.2 of the Strategy) – In order to alleviate duplicate and siloed business solutions, an IT Steering Committee should be created that will meet regularly in order to review and prioritize IT projects.

Funding (refer to section 9.3 of the Strategy) – In order for Council to see the whole IT Budget picture (operational and capital) it is suggested that the IT Budget be consolidated during Budget Deliberations so as to contain ALL department requests as opposed to each department having separate line items. Perry Group has also indicated that the municipality submit an application for funding through the

Implementation Stream of the Municipal Modernization Funding Program (Attachment No. 2) in an effort to acquire some necessary funds that will assist in offsetting a portion of initial business solution costs associated with modernizing and upgrading Essa's IT systems. The application, if approved, would require the municipality to commit to 35% of the overall total project cost. Priority is given to projects that address one or more of the following priorities: digital modernization, service integration, streamlined development approvals, and shared services/alternative service delivery models. The deadline for completion of the approved project is September 30, 2022.

New IT initiatives that were approved in the 2021 Budget are as follows:

Clerk's Department
- o Customer Service Module in Innisfil's MOAR system

Parks and Recreation
- o Purchase of surveillance cameras and software for multiple municipally owned locations

Public Works
- o AutoCAD Civil 3D software (will be the master program to control all internal GIS data)
- o ESRI software (will promote public engagement and participation and allow live updates to the public (ie: snow routes, speed hump locations). Data will be integrated with AutoCAD Civil 3D software.
- o Survey-grade equipment that will also serve partial GIS purposes. This capital purchase will be utilized to update municipal assets
- o Angus Drone Footage Ortho (high resolution aerial map) which will allow for geo-reference of physical assets (ie: hydrants)

Treasury Department
- o HRIsMyWay software
- o Questica software

It is important to note the department-specific IT initiatives approved in 2021 have the capability of integrating with other business solutions for access by other departments. For example, the survey grade equipment and software that will be used to update municipal assets in Public Works can be linked/synchronized with other systems to avoid duplication and/or "siloed" data.

Perry Group has provided a suggested Work Plan for the Township to follow for implementation of the IT Digital Strategy. This Work Plan will be adjusted by the IT Steering Committee and presented to Council through future budget deliberations.

FINANCIAL IMPACT

At this time, we are not asking for any funding approval. Although the IT Digital Strategy identifies a number of improvement initiatives that will have capital and operating budget implications, initiatives will be prioritized by a newly established IT

9a

Steering Committee and presented to Council for consideration in future budget deliberations.

Perry Group Consultants have recommended that Essa increase the IT base operating budget to a number more inline with other municipalities taking advantage of digital services. Perry Group recommends investing 2.5% to 4.5% of the total annual operating budget towards IT. In 2020, Essa was spending approximately 1.6% of their annual budget on IT. To bring the Township to the suggested 2.5% of the annual operating budget requires an infusion of $118,000.00 into the annual IT Operating Budget. It is at Council's discretion as to whether this happens as a lump sum or if they choose to make gradual increases over a number of years, and can be addressed in upcoming budget preparations. Typically, spending on IT, although seemingly high, usually can be balanced in savings or avoidance of future costs in other areas, and provides for efficiencies in operations. For example, when Essa invested in the cost of a financial system in previous years, they avoided the cost of additional staff to manually produce tax bills.

Manager of Finance or Deputy Treasurer Approval:

SUMMARY/OPTIONS

Council may:
1. Do nothing.
2. **Approve the Information Technology and Digital Strategy in principle.**
3. **Support an application being submitted for funding through the Implementation Stream of the Municipal Modernization Funding Program, to assist with costs associated with modernization and upgrades to the municipality's IT systems, and as contained in the Information Technology and Digital Strategic Plan.**
4. **Direct Staff to present Council with IT initiatives as prioritized by the IT Steering Committee for Council's consideration in future operating and capital budget deliberations.**

CONCLUSION

It is recommended that Council approve Option Nos. 2, 3 and 4.

Respectfully submitted:

Reviewed by:

Lisa Lehr
Manager of Legislative Services

Colleen Healey-Dowdall
Chief Administrative Officer

Attachments
1 – Township of Essa Information Technology and Digital Strategic Plan
2 – Municipal Modernization Program Guideline (Intake 2)

Township of ESSA
Where Town and Country Meet

Information Technology and Digital Strategy

63

Final Report

March 3, 2021

Perry Group Consulting Ltd.

www.perrygroupconsulting.ca
647-669-9540

1.0   Table of Contents

Introduction

2.0   Executive Summary

Essa Township is a fast-growing rural Community. The resident demands for modern and convenient government services have been increasing. The municipality is also looking for cost effective ways to deliver the services to a wide-spread community with varying needs and expectations. New residents are arriving with digital experiences and expect the same services form the Township. From ordering a pizza to depositing a cheque in your bank can be done using your mobile phone from your couch. Similar conveniences and user experiences are expected from all service providers.

The current state assessment of the technology environment shows that the Township is using technology in some areas to automate the internal business processes with opportunities to expand. Lower levels of technology funding over the years show that there is a backlog of business needs that could be improved using technology. The customer facing aspect of service delivery has received the least attention. The lack of digital service offerings on the Essa website is an example of gaps between current offerings and resident expectations.

Essa is at a pivotal point to make things better. The COVID-19 Pandemic is the catalyst many private and public service providers to re-think the traditional ways of service delivery. A re-engineered digital service delivery option has proven to be effective as well as necessary from the customer perspective. Therefore, the Information Technology and Digital Strategy (ITDS) is timely and necessary.

2.1.   Current State

Essa has developed shared services arrangements with the Town of Innisfil and the County of Simcoe. This is a great way to receive superior services in a cost-effective manner. The staff survey indicates that the IT service are at a high satisfaction level.

Here are some highlights from the current state analysis:

Key Positives:

- Management and staff are keen to use more technology
- IT support services are rated high by the staff based on the staff survey
- Shared services with Innisfil IT, County a smart move

The existing technology environment has many positives: MOAR, GP, Lifecycle management practices, virtual server environment etc.

Key Challenges:

- Gaps in customer facing online services. E.g., online payments, online applications etc.

- Gaps in data analytics, integration and business intelligence capabilities
- Many business areas are still depending on manual processes
- Technology decision making is distributed and ad-hoc
- Technology funding is not adequate compared to the industry best practices

2.2. Opportunities

The digital opportunities for the Township are two-fold. Customer facing improvements and internal improvements. It is important to understand that you cannot provide customer facing digital improvements without addressing the digitization of internal business processes, they are two parts of the same solution. The ITDS also addresses specific Goals in the 2019-2020 Essa Strategic Plan:

Goal 3: Customer Service Excellence

Desired Outcomes:

- To enhance our customer service so that residents feel well-informed.
- To ensure that we are known to be friendly and helpful.
- Easy to access information.
- More/better use of technology.
- Improved communications with easy-to-read newsletters and publications.

Goal 4: Good Governance

Desired Outcomes:

- To find efficiencies in service delivery to ensure optimal effectiveness.
- To streamline processes.
- To eliminate duplication.
- To ensure that the municipality is responsible and accountable to its taxpayers
- Partnerships to cost share in service delivery.

The ITDS has identified opportunities in the following focus areas:

- Digital Services (customer facing): Providing residents the ability to request, receive and pay for services online anytime from anywhere.
- Digital Communications and Community Engagement (customer facing): Building digital channels of communication with the residents. Use of the website and social media to connect with residents in 2-way communication in a cost-effective manner

- Digital Business Processes (internal): Reduce the administrative burden in business processes through automation. Improve the efficiency of internal processes through digital workflows, approvals etc. integrated with the customer facing online services
- Digital Awareness (internal and customer facing): Improve the digital awareness among the leadership, staff and citizens through awareness campaigns and training opportunities
- Broadband Internet Access and Connectivity (internal and customer facing): Improve the connectivity between various Township buildings and improve the access to high-speed internet to residents in rural communities in Essa.

Based on the current state, these are more necessities than opportunities.

2.3. Implementation of the ITDS

In order to prepare for a successful implementation of the ITDS, the Township should look at the following key areas:

- Governance: Technology decision making and the responsibility of the implementation of the ITDS should be led by the Senior Management Team.
- Repositioning of IT: The IT services received from Innisfil IT should be elevated to be a more strategic partnership. High-level IT advisory services should be available to the Township
- Increase funding: Infusion of additional funding for technology is key to achieving the exemplary customer service through the modernization and innovation initiatives identified in the ITDS
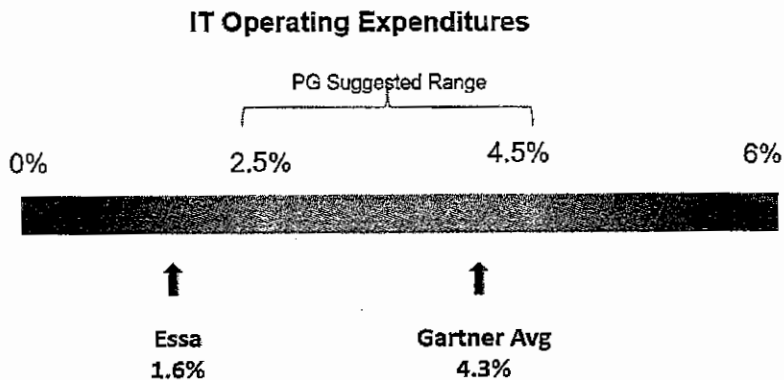
IT Operating Expenditures

PG Suggested Range

| 0% | 2.5% | 4.5% | 6% |

Essa
1.6%

Gartner Avg
4.3%

Figure 1 - IT Operating Expenditure Comparison

The following chart shows that the technology funding in the Township is 1.6% of the overall operating budget. The Perry Group suggested range is between 2.5% to 4.5%. The ITDS is proposing that the Township increase its technology budget to a minimum of 2.5%. This is equivalent to a $118,000 increase to the annual operating budget.

2.4. Benefits

The implementation of the ITDS is aligned with the corporate strategy of Essa. The main focus has been improving the levels of services for the end customer, the residents and businesses of the Township. While improving customer experience, the initiatives of the ITDS workplan also improves internal business process efficiencies. The end-result should also reduce the cost-of-service delivery in the long run. The following benefits have been identified:

- Enables excellent customer service: Digital channel provides convenience to residents, anytime, anywhere
- Improves customer engagement: Social media, online surveys, virtual meetings etc.
- Improves the service delivery timelines: Better turnaround times due to automation
- Less duplicate data entry due to integrated systems
- Addresses resident concerns in a timely manner: Automated status updates to applications, concerns, complaints
- Helps the environment: Paperless process reduces the amount of paper (E.g., tax bills)
- Reduces the service delivery cost: Online service cost is lower than over the counter or over-the-phone
- Creates capacity: Automation reduces the need for manual processing by staff
- Increases Transparency: Digitization allows the Township to collect and share data with public, Council and the management
- Reduces the number of complaints received by the Council: Digital business processes can provide automated status updates to customers (E.g., planning applications, property complaints, snow issues)
- Helps make informed decisions: Data analytics allow Council and Management to make decisions based on evidence, data and trends
- Increases the accessibility and availability of services: Driving to a Township office is not required, out-of-town/seasonal/out of town workers/ residents are served
- Helps deliver the Essa Corporate Strategic Plan 2019-2022

3.0   Introduction

The Township of Essa initiated the development of an Information Technology and Digital Strategy (ITDS) that will leverage existing municipal digital platforms and applications in order to provide superior, efficient and cost-effective services to its customers.
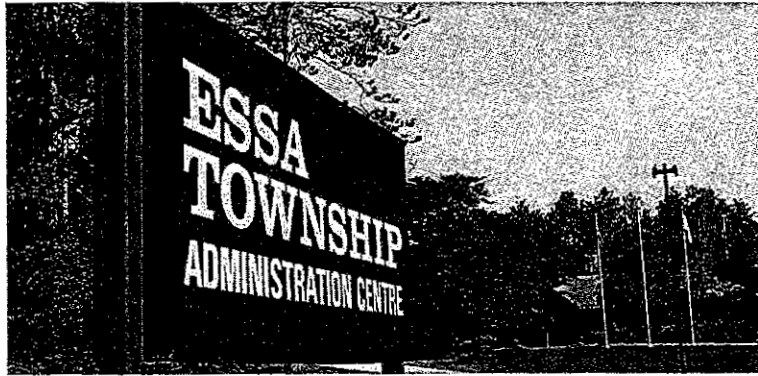
The objective of the project is to develop a roadmap to build a more integrated digital environment that will enhance customer service and drive operational efficiencies by optimizing existing technologies and identifying gaps where new technology solutions are needed.

The growth in Essa has been steady and increasing. The new residents who are moving into the Township have high expectations for digital transactions and engagement. The expectations of the ITDS are to build a roadmap for the Township to enable digital service delivery to its residents.

Perry Group Consulting was hired to develop the ITDS. Perry Group is a leader in municipal IT strategy development, who has worked with over 130 municipalities providing IT strategic services over many years. The consultants of Perry Group are also former municipal staff with extensive experience working in municipalities. This combination of experience and exposure are critical to understand the challenges faced by municipalities and to identify practical solutions.

4.0   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 and effectively engaging citizens in decisions related to the building of the community.

Municipalities face several pressures as they embark on digital and modernization strategies to meet their communities' needs and requirements.

4.1. Pressure on Core Services

All departments are reliant on core corporate functions – but financial processes in particular, are critical business processes in discharging their responsibilities and impacting on others.

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

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

- 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. This means the Township has to change the way it is delivering service to meet the needs of its residents who, especially now, use online services as 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 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, as 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 and other infectious viruses.
  - 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 on 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, is advantageous. Adaptation should become a core competency for any high-functioning municipal organization.

5.0   Responding to Changed Customer Expectations

Many municipalities are rightly considering moving services online because customer expectations have changed. Not only has COVID reduced the desire for personal interactions and shown how offering services digitally can work, but the reality is also, many citizens today rely on their devices as a way of life.

We have all moved from the 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, online news.
- Travel – Airbnb, Expedia, aircanada.com.
- Retail – Amazon, Indigo, beer and wine direct, Skip the Dishes.
- Transportation – Uber, Lyft.
- Insurance – Compare and buy insurance online, report a claim online.
- Exercise – Online classes.
- Education – Online school, remote tutoring.
- Health – Telehealth, virtual medical appointments, 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.

A common sight at the sports fields is many hockey/soccer moms sitting on the sidelines, registering for programs, booking appointments and hotels and ordering dinner, plus responding to several emails, all while their children are involved in a 45-minute practice – a very efficient way of getting things done!

Governments too are responding to these changed expectations and are rapidly moving services online. Think about the online services that ServiceOntario 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 a tablet 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 does introduce online services, this does not mean it should stop offering services via existing methods or channels. Customers should still be able to call or drop into Township offices to carry out a transaction, to seek advice, 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 are certain many will choose because of its convenience and ease of use.

5.1. 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 easy, 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 solutions (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) 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 and reduce delays caused by hand offs. It would also reduce errors in entering data and provide up-to-date information for managers and supervisors.

> *Jane has just moved into a new home in the Township. She calls to inquire about setting up her tax payments via pre-authorized payment. 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 dance lessons, finds out when her garbage collection day is and where she can pick up a new recycling bin, and arranges for a burn permit 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, reducing the times Jane has to call the Township and saving staff time, 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 home in Essa. 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 dreaming of a Jetson's future.

Real municipalities are delivering their services *in this way today*, and the municipality doesn'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 some 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 license.

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.

5.1.1. Service Delivery in Multiple Ways – Encouraging Digital Adoption

The Township should 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 2018) identified that 92% of households in Ontario had access to the internet. 71% of seniors were using the internet in 2018 compared to 48% in 2012.

It is reasonable to assume that, today in 2021, these numbers are 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 Essa, 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.

Channel	Cost per Transaction (Service Canada)
Web / Online	$0.10
Phone	$4.00
Face-to-Face	$6.50

Table 1 - Transaction Cost Comparison Across Service Channels

Reference: Anywhere, Anytime, Any Device: Innovations in Public Sector Self-Service Delivery Research Report by Kenneth Kernaghan Brock University 2012

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.

6.0   Project Approach

The following chart shows the basic steps in the approach taken by Perry Group.

Project Start-Up	Discovery	Future Directions	Final Report
• Meet with Project Sponsor and Team to Clarify Project Scope • Gather Background Documentation • Review and Analyze	• Conduct All-Staff Survey • Apply **MTMM & MOSA** • Conduct Department Interviews • Identify Findings of Current State	• Identify and Prioritize Strategic Directions • Develop Recommendations • Review Recommendations	• Summarize Recommendations and Implementation Plan • Prepare and Deliver Final Report

MTMM: Municipal Technology Maturity Model, **MOSA**: Municipal Online Services Assessment

The majority of time was spent with staff to understand the current status. Feedback was collected directly from staff through a variety of methods.

An online survey was distributed to all staff providing the means for feedback, comments and their assessment. Key findings from the survey were used to inform the current state assessment and the future needs recommendations. Further details on the survey results can be found in section 7.5 below.

Individual meetings were conducted with the Essa IT team in order to understand the technology environment.

Departmental interviews were conducted with the CAO, and representatives from Clerks, Planning and Development, Fire, Public Works, Finance, Parks and Recreation. An interview guide was provided ahead of time providing the opportunity for discussion among the teams as well as a facilitated discussion with the consultants. These discussions provided much of the information contained in this report.

The consultants used the MOSA (Municipal Online Services Assessment) and the MTMM (Municipal Technology Maturity Model), both developed by Perry Group over the last decade with over 100 municipalities, to assess the current online services and the technology maturity levels. See further details about the MOSA and MTMM assessments in section 7 in this document.

A financial analysis was conducted to understand the investment in technology compared to total expenditure of the Township. The budget numbers were compared with industry benchmarks. Details of the financial assessment are available in Section 7.

Based on the inputs from all sources above, the consultants prepared a high-level current state assessment and high-level recommendations. The high-level information was shared with the project sponsor (Clerk of the Township) and the IT Manager from Innisfil. After the review of high-level current state, the consultants collaboratively developed a set of recommendations with key stakeholders at the Township followed by a presentation to the Senior Management Team, and then proceeded to prepare a draft of this report. The draft report was shared with the project team for review and input. Based on the review feedback, the final IT and Digital Strategy was prepared and shared with the Senior Management Team of the Township.

Current State Assessment

7.0　Current State Assessment

Before developing any future-looking strategy, it is important to take stock of the current situation. This section describes the current state of the Township's technology systems, and the Township's current approach to managing its technology.

It summarizes the consulting team's assessment and observations.

7.1.　Key Positives – What's Working Well?

Through the Discovery Phase, there have been several positive observations made. The staff survey and the departmental interviews have indicated that the current IT support is excellent. The arrangement with the Town of Innisfil IT department for the IT support seems to be working well. It is also evident that the staff wants to use more technology in their day-to-day processes including expanding online services and the use of more GIS tools. This shows that the staff is on-board with expanding the use of technology in the Township.

7.2.　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 services.

- 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.

Perry Group consultants conducted the assessment by visiting the Township's website and attempting to find and or complete these transactions.

The results of the assessment are shown below in Figure 2:

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

Online Agendas / Minutes	Y	Track development application	N	
Online bid management	N	Transit planning	N/A	
Online chat with CSR	N	Tweet for help	N	

Figure 2: MOSA Assessment Results

This assessment confirms that the Township currently offers a limited number of the online services typically provided, lagging in comparison to other municipalities. There are over 50 forms available on the website. Almost all these forms are static non-fillable forms. Customers are required to print, fill, scan and email or handover these forms to a Township office to request a service.

The number of online payment options through the website are also limited to pet licenses, recreation registrations and burn permits. All other payments must be made in-person or by mail-in cheques. Repeatable payments such as taxes and utilities have the pre-authorized payment option or direct payment through the bank. Online map-based features are limited to a few pdf ward maps and a link to the County maps page.

7.3. Municipal Technology Maturity Model (MTMM)

Perry Group's standardized Municipal Technology Maturity Model (MTMM), shown in Figure 3 below, was the basis for evaluating the Township's technology environment.

The MTMM provides a framework for the consulting team to assess a municipality's technology environment and is also a guideline to assist municipalities in targeting their needs and priority work areas, as well as tracking progress.
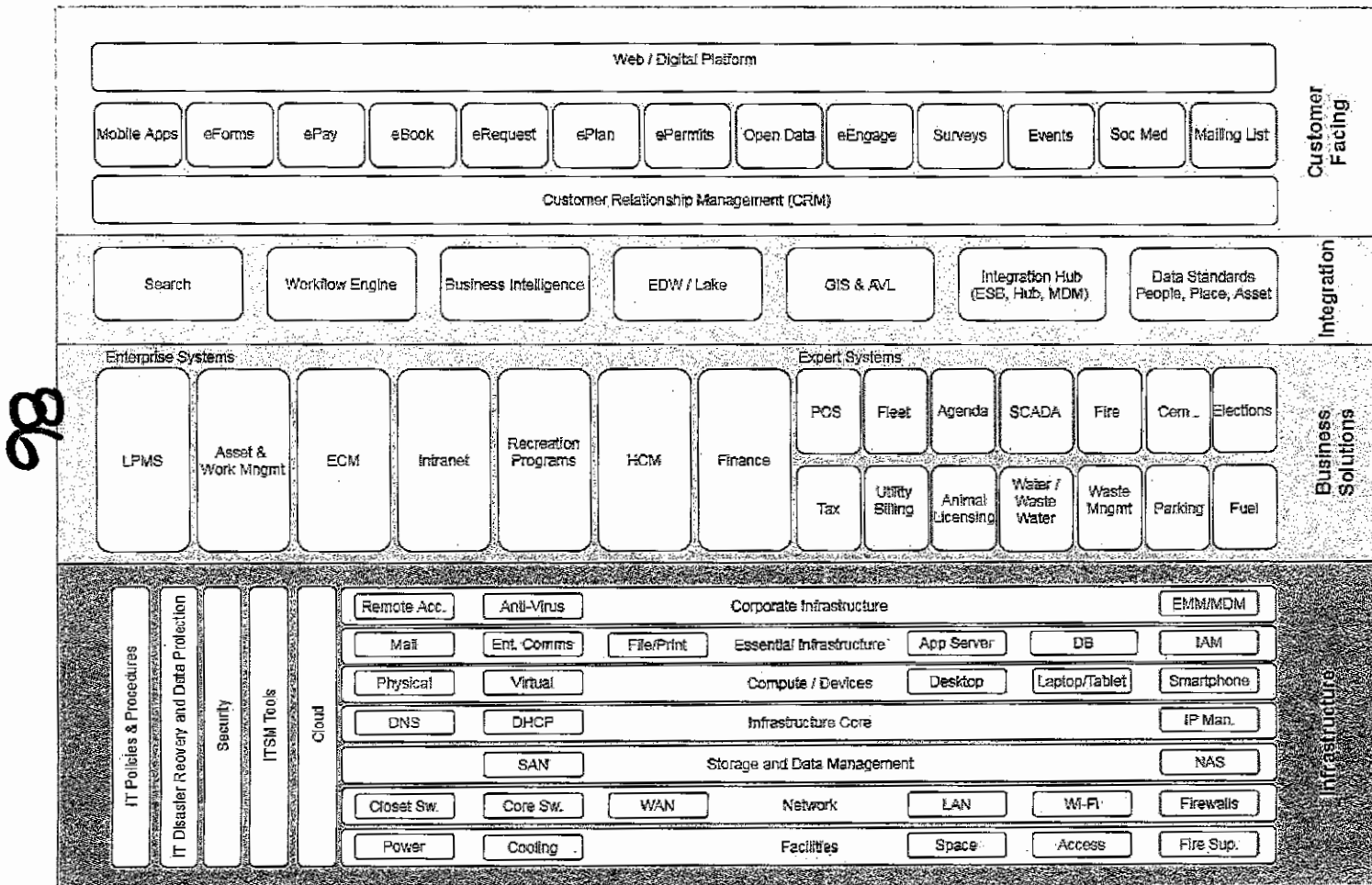

Figure 3: Municipal Technology Maturity Model

7.3.1. Four Technology Layers

There are four main technology layers – Infrastructure, Business Solutions, Integration, and Customer-Facing Technologies.

Within each layer, there are specific technologies or solutions. For example, in the Business Solutions, items include:

- A Finance system (such as GreatPlains).
- A Planning and Permitting system (such as MOAR).
- A Fire Incident Management system (such as FireHouse), and
- A Work Management system (such as Mesh).

Each layer requires discrete IT skill sets to be managed effectively. For instance, while technology infrastructure management is deeply technical, business solutions projects require project and process management, change management and people skills. Web projects need development and UX (User Experience) expertise.

The Layers Explained

An IT organization needs a breadth of skills across the various layers to effectively manage the complete environment.

Table 2 below provides a detailed description of each layer.

Infrastructure	Business Solutions	Integration	Customer-Facing
This is the foundation for the entire technology environment – all other layers – so must be robust and reliable.	Limit the number of corporate business solution platforms to minimize process and information silos.	Well integrated business solutions allow data to be automatically passed between systems, reducing data duplication and errors, and ensuring auditability, while enabling data analysis and visualization using GIS.	This layer is what the customer experiences – the web content management platform for online services, eForms, ePayments, the ability to submit and track service, permit and planning requests, to subscribe to notifications or to watch video recordings of Council meetings.
Unreliable infrastructure undermines all the technology that sits above it.	Core systems should be commercial off-the-shelf (COTS) solutions configured		Customer-facing digital solutions should allow customers to easily find

Infrastructure	Business Solutions	Integration	Customer-Facing
	to support business processes (payroll, finance, tax, HR, recreation programming, etc.).		information, to conduct transactions with the Township (e.g., submitting requests and applications, making payments) to engage with the Township to provide input on important decisions.
Policies, security, data protection and disaster recovery provisions should be in place to protect information assets and meet legal compliance obligations.	Customization should be avoided.		Systems must be integrated into back-office business solutions.
Tools are required to help manage the IT environment and tasks simply and efficiently (e.g., a helpdesk request tracking system, systems management solutions, and automation tools such as remote support, patch management, mobile device management), to increase IT staff productivity and enable employee self-service (e.g., password resets).	These systems or platforms provide the foundation for automated and streamlined business processes and gather data to drive analytics capabilities and underpin the effective delivery of online services.		If processes are not digitized in the back-office, they cannot effectively be offered online.

Table 2: Descriptions of the Four Technology Layers

7.3.1. Technology Assessment – Build from the Bottom Up

The IT architecture should build from the bottom up – Infrastructure first, then Business Solutions, and so on. It is impossible to offer (for example) online building permitting services, if the back-office uses Excel and paper files.

These are some of the basic tenets that underpin a well-designed technology environment and under which a complete municipal technology environment should operate.

Figure 4 is a summarized version of Perry Group's Municipal Technology Maturity Model (MTMM). The diagram reflects that all of the layers are interconnected:

- Without a stable, secure, Infrastructure Layer, reliable business applications cannot support efficient and effective service delivery.
- Without these back-end applications, delivery of integrated end-to-end online services cannot be achieved.
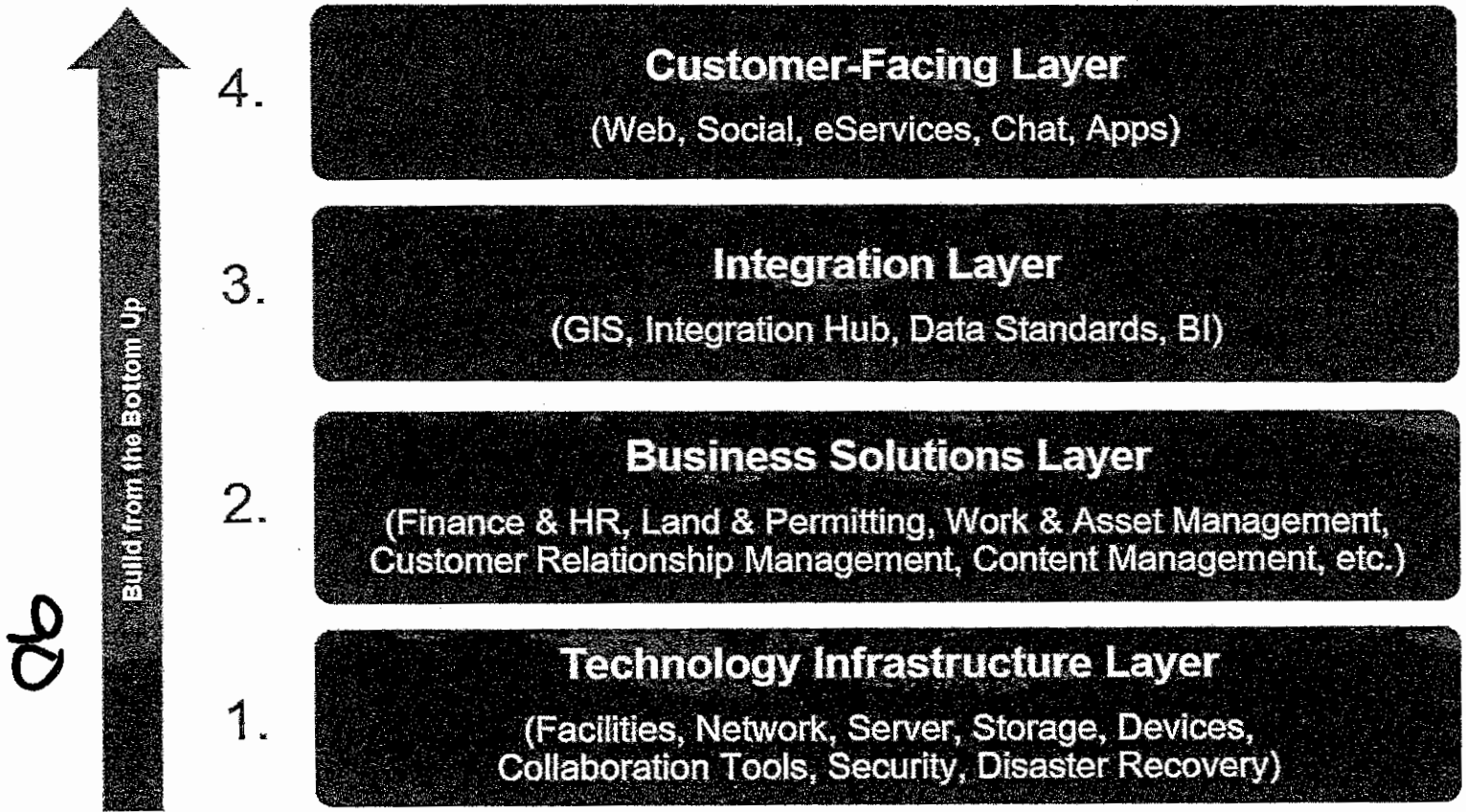- And without the Integration Layer, information remains locked within individual application silos.

Figure 4: Visualization of Technology Architecture

7.4. Assessment Results and Key Takeaways

Perry Group reviewed Essa Township's technology against the MTMM. The MTMM diagram in Figure 5 below colour codes the results of the review.
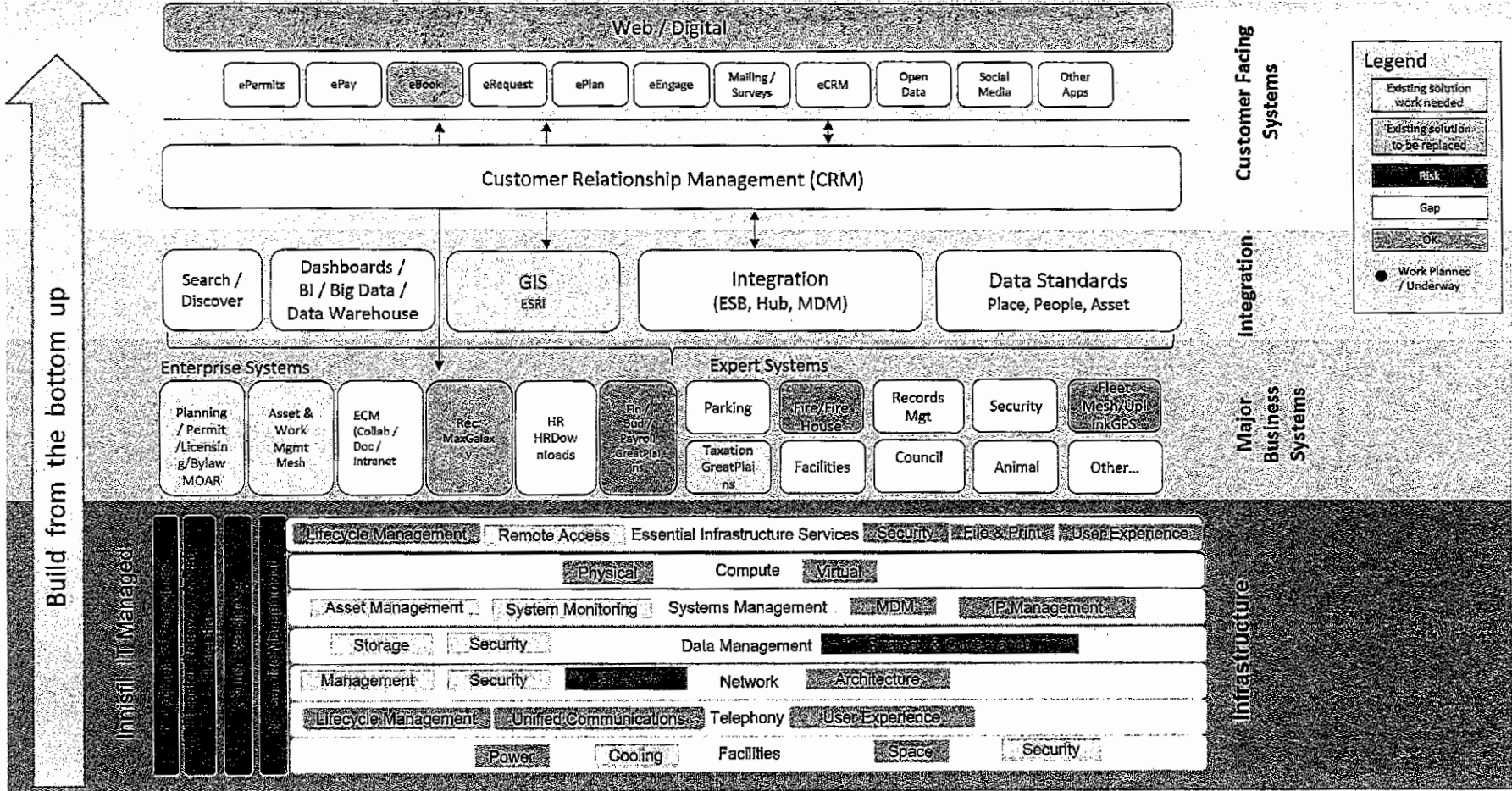

Figure 5: Essa MTMM Assessment Results Visualization

7.4.1.   Key Takeaways

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

Infrastructure	
Positive Aspects	• Infrastructure is hosted in both Innisfil and Essa facilities. The Infrastructure layer in most areas is stable.
Key Issues	• Network access in remote locations needs improvement. • Need a Business Continuity Plan (BCP) and a Disaster Recovery Plan (DRP). • Need to develop a Cloud Strategy. • Need to implement IT Service Management best practices (ITSM) for Incident, Change and Problem Management. • A Security Incident Management Procedure is required. • Data management processes should be implemented in line with the Township's records management practices.

Business Solutions	
Positive Aspects	• MOAR is implemented in some areas with potential to expand into others. • Great Plains (GP) is in stable status with all financial and billing functions automated in the same system.
Key Issues	• The following business areas are managed manually and require systems for automation: Parking, Animal Control, Intranet (internal website), Records Management and Council and Agenda Management. • MaxGalaxy system is earmarked to be replaced.

	• Mesh system is used for work management; the Township needs a more comprehensive Asset and Work Management System.

Integration

Positive Aspects	• Integration is minimal.
Key Issues	• Lacks a data analytics and BI (Business Intelligence) environment. A Data strategy should be developed with necessary tools to manage and present data. • GIS is not integrated with property information and asset information.

Customer-Facing

Positive Aspects	• Essa has a website that provides some information to the residents. • A Twitter account is also available. • Residents can register for recreation programs through the website.
Key Issues	• The website has an outdated design and require AODA compliance. • There is no photo gallery feature. Instead, pictures are in pdf documents. • There is no video gallery feature. • There are very few online services. • Most of the forms are non-fillable and are not integrated with the back-office system. • Lacks online payment options through the website, other than the Rec program registration.

7.5. Staff Survey Results

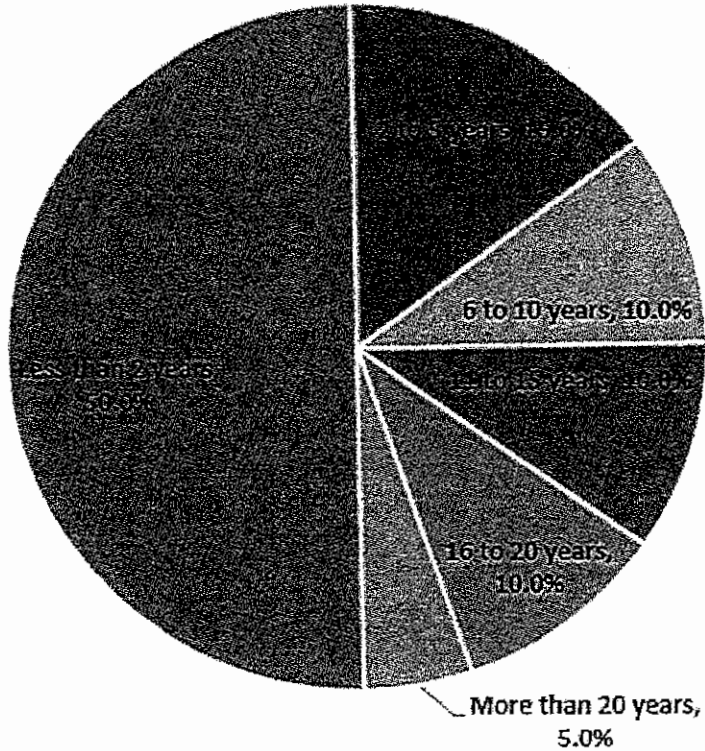The online survey was available to all staff for a month. A total of 21 responses were received.

Figure 6 - Staff Survey Respondents Demographics

All departments were represented, providing an excellent cross-section of employees. The majority of respondents to the survey were front-line staff members (60%) with the remaining 40% being supervisors and managers.

Interesting to note was that 50% of respondents have worked for the Township for less than 2 years, providing for a lot of new insight. 25% have been with the Township for 11 years or more.

The majority of respondents, approximately 68%, work at the Municipal Administration Building. The different facilities, including the Thornton Fire 16%, Thornton Arena 5% and the Roads yard, make up 10%. This represents an excellent cross-section of responses.
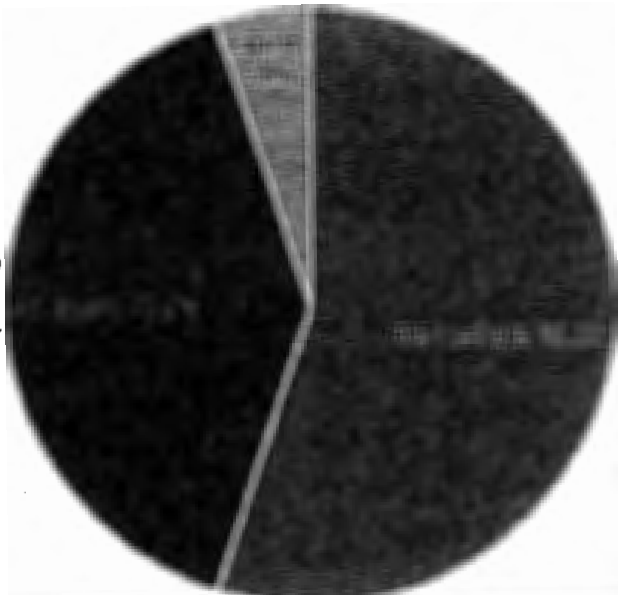

Figure 7 - Staff Technology Proficiency Levels

Overall, 74% of respondents identified themselves as office or desk-based users. The technology proficiency levels were identified as 40% advance, 5% expert and 55% as intermediate.

7.5.1. IT Tools

Respondents who have access to the network drives and email and calendar are the closest to meeting the satisfaction target of all tools questioned. Network speed has the lowest rating with a satisfaction rate of only 35%. Mobile devices had the most N/A responses. Further details were provided in the comments such as "Happy with access to internet at the admin centre but NOT at other workplaces." and "Often internet lags or unavailable at times. Phone reception cuts out from time to time or doesn't work at all."
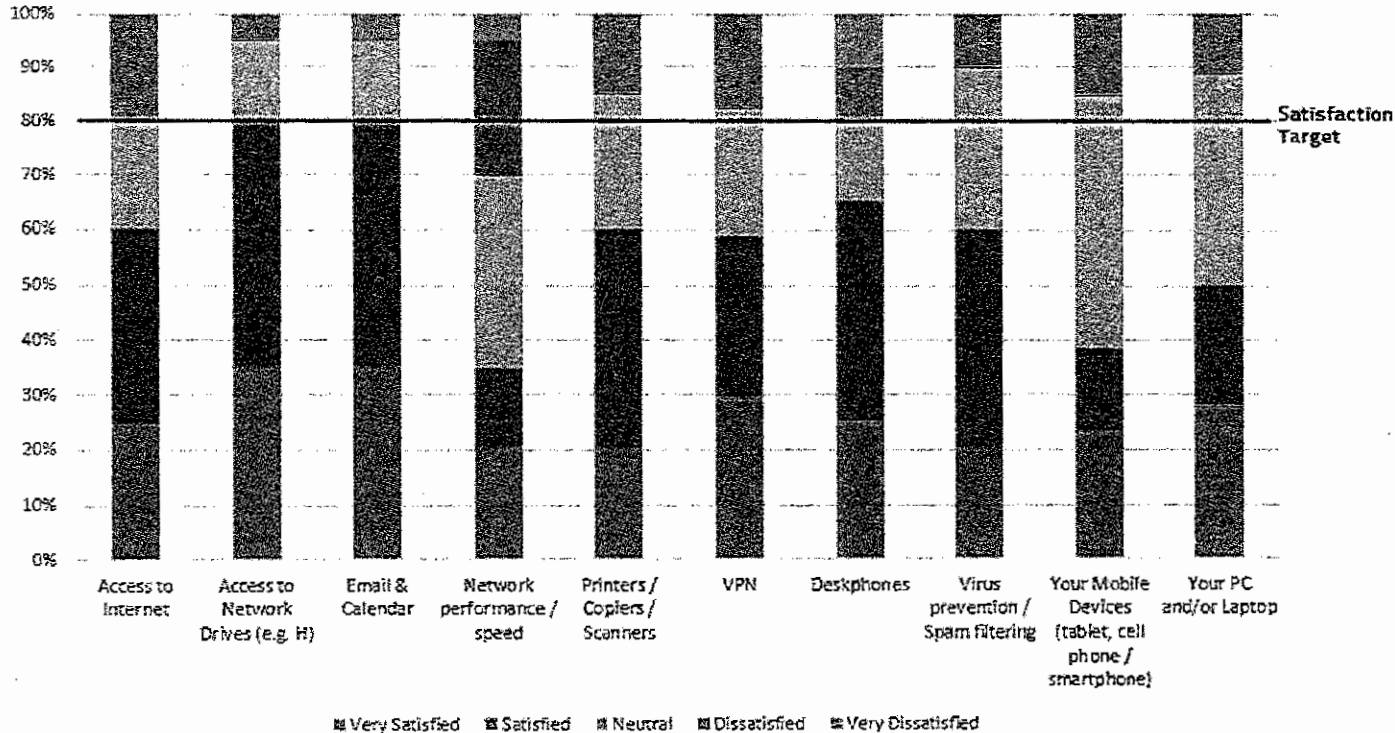

Figure 8 - Staff Satisfaction of IT Tools

Less than 60% were satisfied with the VPN service.

Desktop computer or laptop had a less than 50% satisfaction among respondents with comments noting they were very slow and challenging to work with, especially when the network is slow.

It was noted that most desktops and laptops don't provide video conferencing facilities.

60% of the staff also do not use their personal devices for work.

7.5.2. Business Solutions

Overall, most of the business solutions are below the satisfaction target with MSOffice being the only enterprise-wide system that has an 80% satisfaction target with GP a close second. MaxEnterprise has the lowest satisfaction rating with FireHouse as a close second.
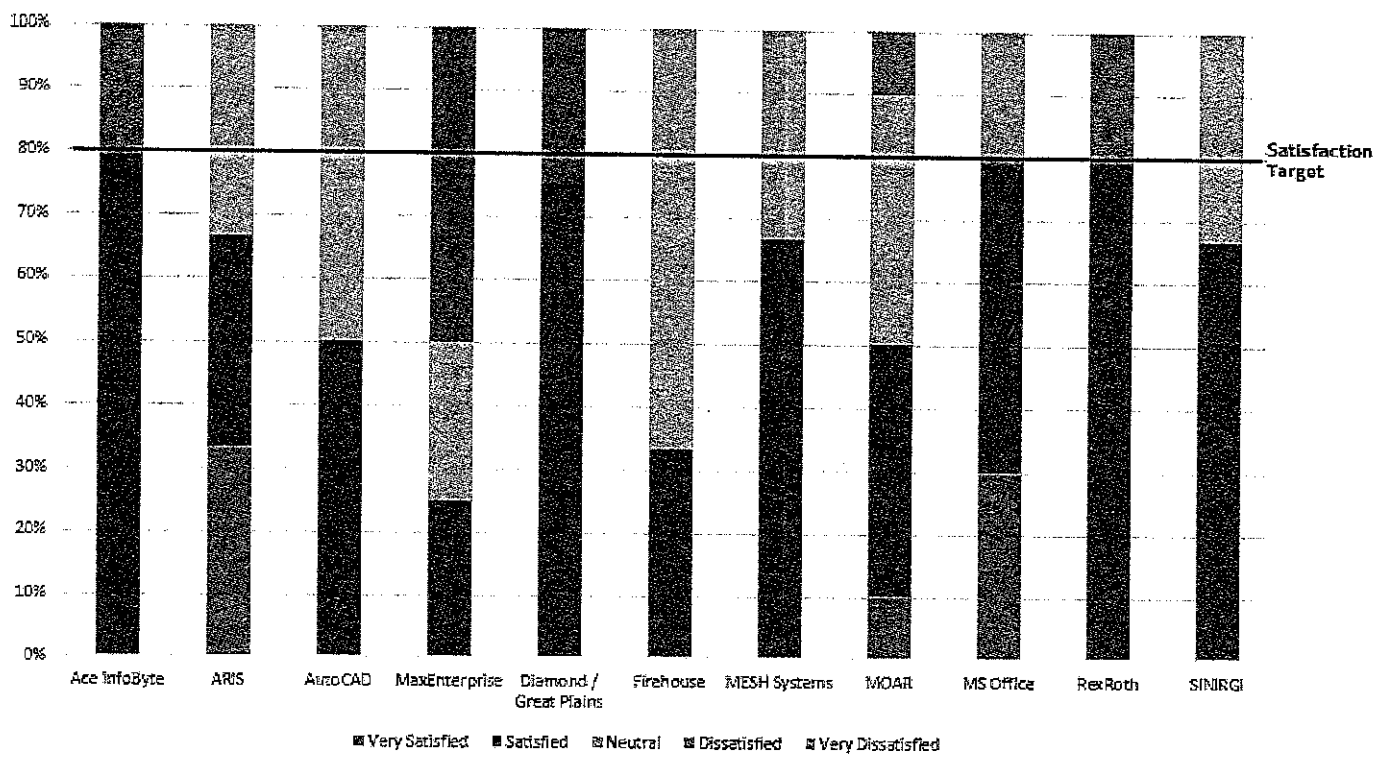
Some additional comments by the users are in sync with the overall ratings:

"Great Plains/Diamond is too slow"

"Currently using MaxGalaxy as booking software. Very dissatisfied and will be switching to another company."

"Would like MOAR to enable all departments to use."

Figure 9 - Business Solutions Satisfaction Rating

7.5.3. GIS/Web Mapping

60% of respondents use GIS / mapping-based tools at least weekly while 20% of respondents have never used GIS / mapping-based tools. Majority of the GIS users (60%) are either neutral or dissatisfied with GIS tools while only 28% are satisfied. Some of the comments show that the Township should have more access to GIS.
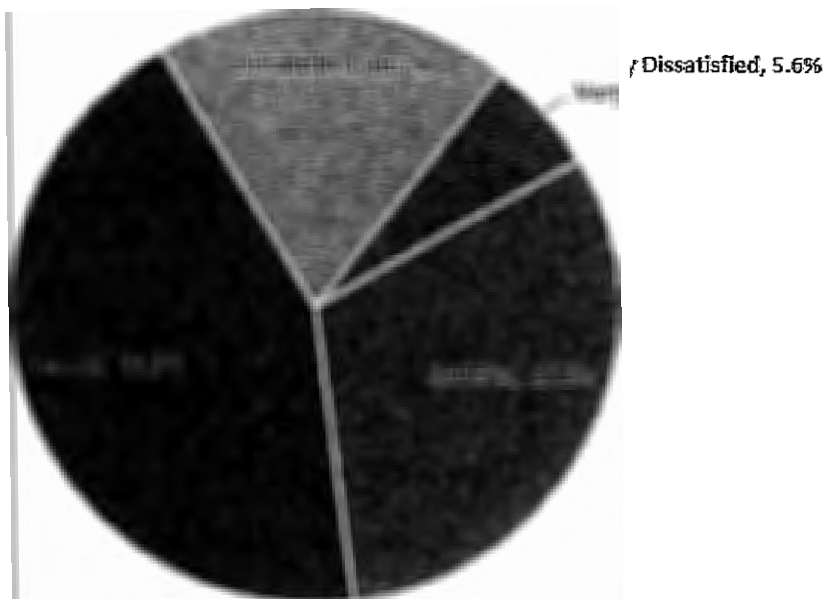
Figure 10 - GIS Satisfaction Rating

"We need **more readily available layers**. The layers that the county or CA have on the Township are needed for us to map property, as well as NVCA layers. We need all staff in Planning to have access to a desktop version so they can update or use it for their general inquiries and learn the systems. It needs to be updated on all maps!"

"Have more **asset information** available, better imaging, show municipal drains."

"This needs to be more interactive with **more property data**, an official plan layer, a link to our zoning by-law in accordance with the subject zone information, a link to the official plan with the subject designation information and needs to be available through a public facing platform."

7.5.4. IT Services

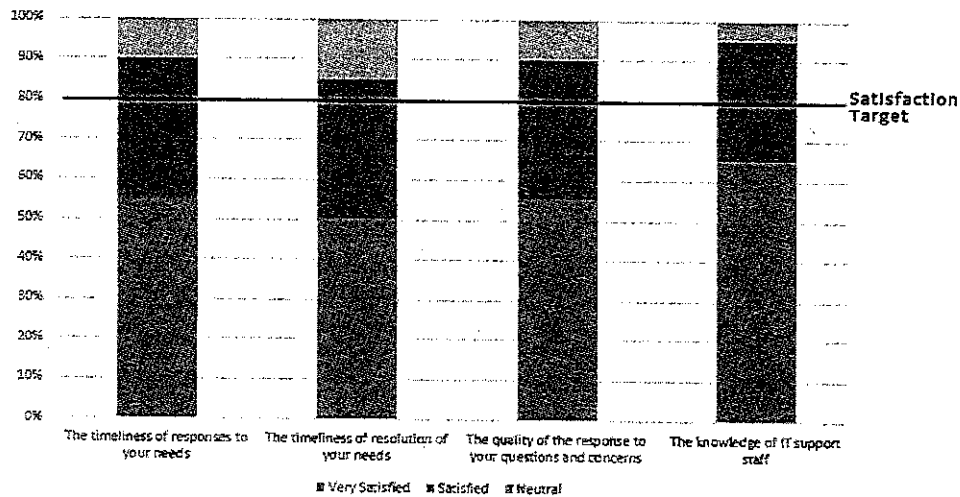Figure 11 - IT Services Satisfaction Rating

Some additional comments have confirmed this rating:

"Essa is very lucky to have the services of the Innisfil IT Department. They are a lot more organized, knowledgeable and efficient versus other IT departments that I have worked with."

"Quality of the work is outstanding; availability is subpar."

"We are very lucky to have IT because we have quite a few issues in this space, and he is always responsive, helpful, personable, and works through the issue until it is resolved."

The service area focusing on technology is the highest rated and is approaching the satisfaction target.

Overall, 75% of the users are satisfied with the reliability of IT Services. A very high rating of the IT department's services is notable.

"Great work is done operationally; but they only have enough time to put out fires; nothing strategic appears to be going on."

The service area focused on GIS and mapping could be examined for improvement. Further comments show that more involvement from Innisfil IT at a strategic level is expected:

"I think IT does well for the core technology needs. The only area of improvement would be more regular meetings to discuss IT needs now and future requirements."

7.5.5. New Requirements

When asked, "What new technologies, or changes to existing technologies, do you feel would be of benefit to the Municipality?" staff had numerous suggestions:

- Expand the use of GIS.
- Expand the use of MOAR.
- ArcGIS AutoCAD.
- Data access.
- Intranet site.
- More laptop availability.

80% of respondents are satisfied or very satisfied with how well IT understands their business and technological needs, while no respondents answered dissatisfied or very dissatisfied.

However, only 40% of the respondents are satisfied with the rate of technology change at the Township.
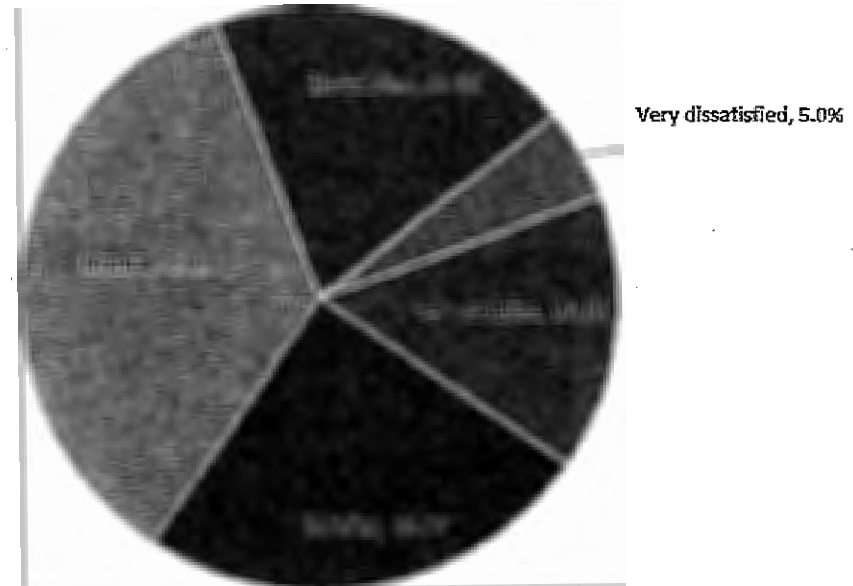

Figure 13 - Satisfaction of the Rate of Technology Change

Some additional comments explain the rating above:

"I think we still need to grow as a Township technologically."

"Very slow to get with current technology."

Figure 12 - IT's Understanding of Business Needs

7.5.6. Training

Training is an area to focus on. When we asked the respondents about the frequency of technology training, a significant percentage of respondents said they have never received technology training (29%).
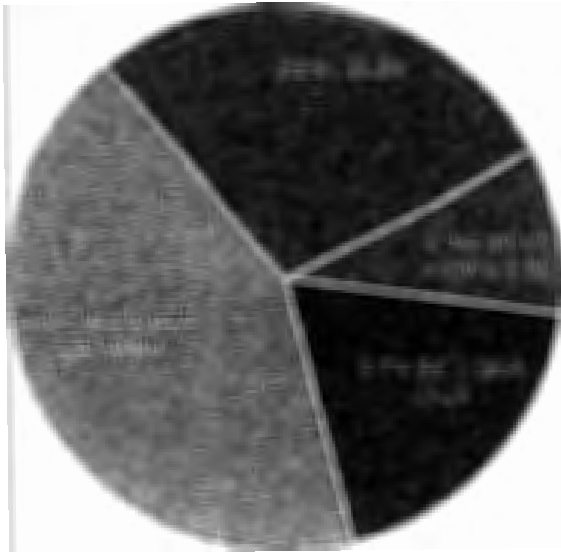
For those who have received formal technology training, the majority received it more than 2 years ago (43%).

Overall, the majority of respondents feel that they are not adequately trained to use all of the technologies available to them.

The comments suggest that more training is required in GIS, MOAR, GP, MSOffice, AutoCAD, MESH, AceInfoBute, MaxEnterprise, RexRoth, SINIRGI.

The following additional comments were provided:

"No training was provided to use technologies; learned on my own."

"Would like more instruction on MOAR and GIS."

Figure 14 - Technology Training Requirements

7.5.7. Readiness for Change

The answers to the question about what the Township could do to improve its use of IT, the respondents reflected on the following themes:

- More training for staff.
- A better website for public with online services; paperless digital processes.
- Providing better equipment to staff.
- Update the technology environment to current industry standards through investing in technology.
- Have more discussions about IT needs.
- Better internet connectivity.

7.6. Financial Analysis

The consultants reviewed the current level of investment in technology in the Township. A common metric is to compare the IT budget to the overall annual budget. Table 3 below shows the 2020 budget data for Essa.

Description	2020 Budget Amount
Innisfil IT Services	$79,000
Corporate Software	$20,000
Corporate Hardware	$30,000
Public Works – Technology	$30,000
Finance – Technology	$51,000
Parks & Recreation – Technology	$7,500
Total IT Budget	$217,500
Total Township Budget	$13,414,774
IT Budget as a Percentage of Total Township Budget	1.62%
1% of the Total Township Budget	$134,000

An interesting finding is that the technology budget is distributed, with each department managing their own IT budgets while the common elements are managed centrally.

The IT budget as a percentage of the total Township's budget is 1.62%.

This is below the recommended range of technology investments in the municipal sector.

Table 3: 2020 Budget Data for Essa

The municipalities who are using technology effectively, are investing between 2.5% - 4.5% of their operating budget in technology. This recommended range is derived based on the years of over 100 municipal engagements by the Perry Group Consulting.

IT Operating Expenditures
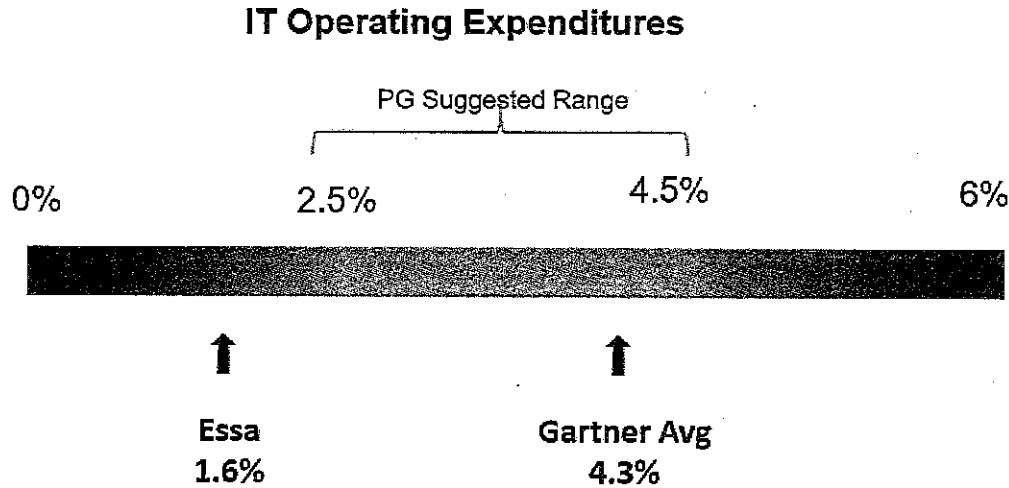
Figure 15 - IT Operating Expenditure Comparison

According to the IT Key Metrics Data 2019 by Gartner Research, public sector organizations in North America spent an average of 4.3% of their total budget in technology. This is an annual shortfall of $360,000 compared to Essa's 2020 IT budget.

The Perry Group recommended range for IT spending in Canadian municipalities is between 2.5% and 4.5%. In order to reach higher levels of customer satisfaction and internal efficiencies, Essa has an opportunity to increase its technology funding to reach the recommended PGC minimum level. An additional $118,000 operating funding could allow the Township to reach the PGC suggested minimum level of 2.5%.

IT Spending as a Percent of Operating Expense

Government - State and Local
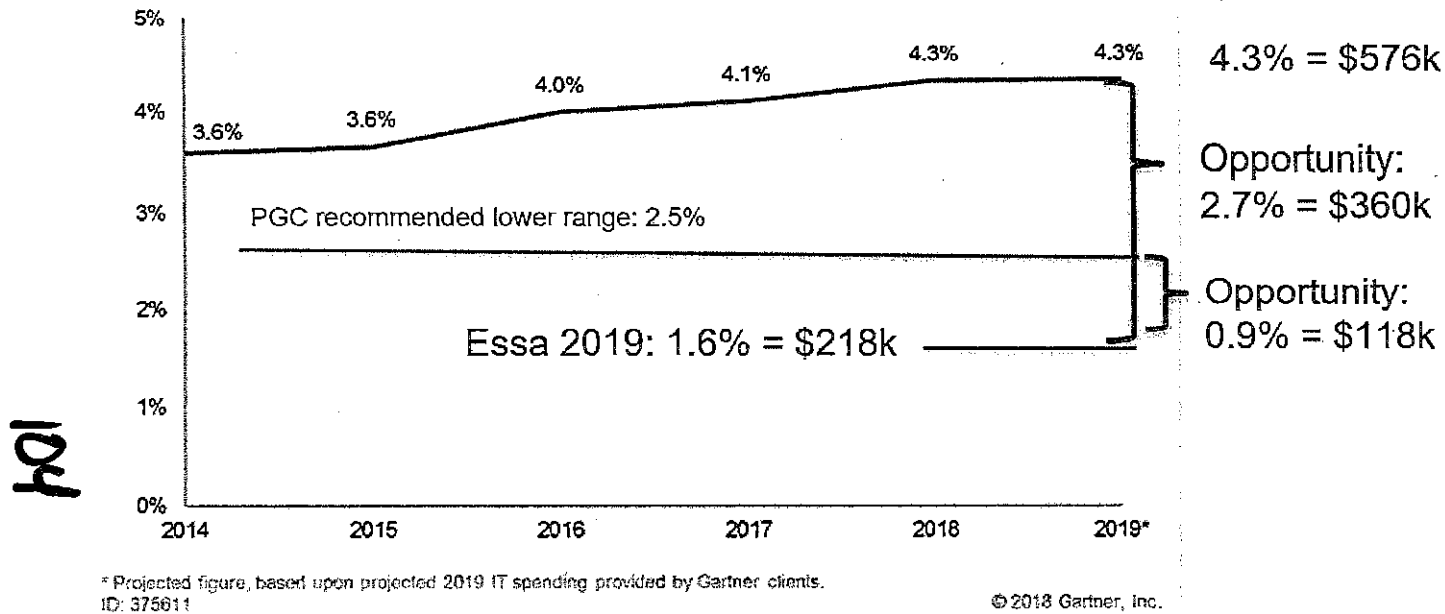
Figure 16 - Gartner 5-year IT Spending Trend

Historically, municipalities that spend more in IT are able to move ahead with more digital services and more savings compared to those who don't. In comparison, the Town of Innisfil's IT budget in 2019 was 3.1% of the Town's total budget. Innisfil is a leader in technology use, among small municipalities.

The Gartner study shows that the trend in IT spending in government agencies over the past 6 years has increased year-over-year.

Government organizations have been increasing their IT budgets consistently over the years and that trend will continue with more and more business processes moving to digital and online. The Township has been increasing its technology budget in the past years, but as illustrated, there is still a gap to be filled.

Table 4 below depicts the budget numbers for the past five years in Essa. The consultants have assumed an annual IT budget percentage of 1.6 as the percentage for all five years. This could be a generous assumption.

This shows that, over the years, the IT deficit has been building up in Essa to a total accumulated shortfall of over $1.3 million over the past 5 years, compared to the Gartner annual average. The same metric compared to the Perry Group lower range is close to $0.5 million. Accordingly, the Township has been continuously spending less in technology.

Description	2015	2016	2017	2018	2019
Essa Annual Budget	$7,800,000	$10,300,000	$10,849,465	$11,688,115	$13,414,774
Gartner IT Spending %	3.6%	4%	4.1%	4.3%	4.3%
*Essa IT Spending %	1.6%	1.6%	1.6%	1.6%	1.6%
Gap with Gartner	2%	2.4%	2.5%	2.7%	2.7%
Annual Shortfall of IT Spending in Essa Compared to Gartner Average	$156,000	$247,200	$271,236	$315,579	$362,198
Perry Group Recommended Lower Level	2.5%	2.5%	2.5%	2.5%	2.5%
Gap with PG Lower Level and Essa	0.9%	0.9%	0.9%	0.9%	0.9%
Annual Shortfall of IT Spending in Essa Compared to PG Lower Range	$70,200	$92,700	$97,645	$105,193	$120,732

Table 4: Essa's Past 5 Years' Budget Numbers

*The current Essa IT budget percentage of 1.6% has been applied to the past 5 years
- The 5-year cumulative deficit compared to the Perry Group lower level: $486,471.

The Strategy

# 8.0   The Strategy and the Digital Focus Areas

8.1. The Strategy

The IT and Digital Strategy (ITDS) is developed based on the inputs received from various sources. The Discovery Phase of this project was the primary source of information to understand the current state. The departmental interviews, staff survey and the document review helped highlight the current challenges and the needs of the Township. The Corporate Strategic Plan 2019-2022, of the Township has identified the corporate goals set out by Council. A direct link was established between the Corporate Goals and the ITDS.

The following specific focus areas of the Strategic Plan have been used to inform the ITDS:
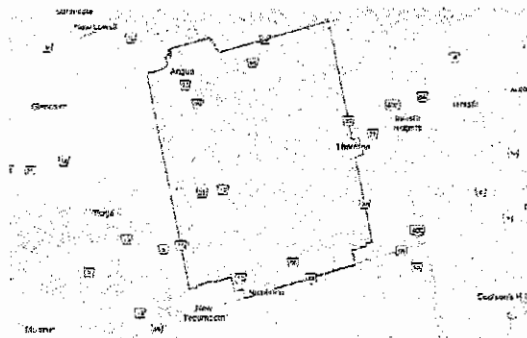
TOWNSHIP of ESSA
Where Town and Country Meet

Strategic Plan
2019-2022

Goal 3: Customer Service Excellence

- Desired Outcomes:
  o To enhance our customer service so that residents feel well-informed.
  o To ensure that we are known to be friendly and helpful.
  o Easy to access information.
  o More/better use of technology.
  o Improved communications with easy-to-read newsletters and publications.

Goal 4: Good Governance

- Desired Outcomes:
  o To find efficiencies in service delivery to ensure optimal effectiveness.
  o To streamline processes.
  o To eliminate duplication.
  o To ensure that the municipality is responsible and accountable to its taxpayers
  o Partnerships to cost share in service delivery.

There is a direct relationship to technology in the strategic plan goals above. The ITDS has addressed the outcomes defined in these goals.

Accordingly, the ITDS is developed to achieve the following objectives:

- To improve customer service and customer experiences.
- To improve process efficiency.

- To provide cost effective services.
- To uplift the level of digitization within the Township.

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.

The digitized platform, shown below in Figure 17, is centered on a powerful central core of business solutions (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.
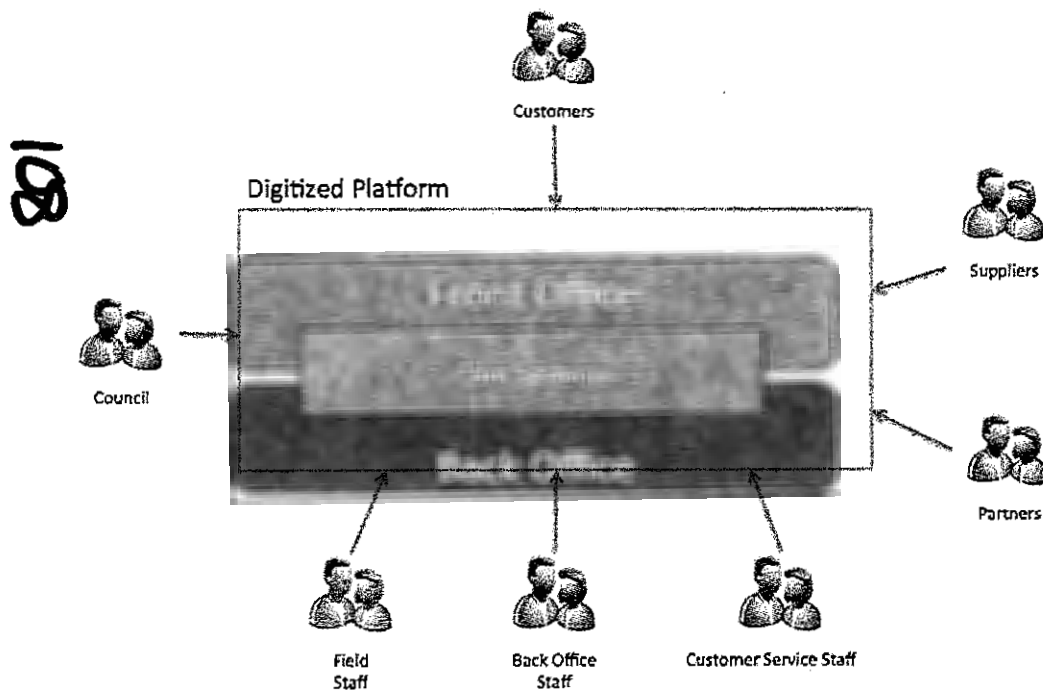

Figure 17: The Digitized Platform

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-centered 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 challenges are encountered, or performance falls below defined levels of service.

Digitization allows the Township to:

- Track its own processes.
- Share information between staff.
- 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 solutions 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.

8.2. ITDS Focus Areas

The ITDS will have specific areas to focus on. The delivery workplan is developed based on these focus areas.

Each focus area has a proposed list of deliverables and a mechanism to measure the success. The future workplans and budget allocations will be focusing on delivering specific projects in these areas.

8.2.1.   Digital Services

"There is no difference between digital service delivery and service delivery. Today, everything is digital. If governments do not recognize this evolution, then any service strategy is flawed at the concept stage" – Alex Benay, CIO Canada, 2017-2019

The Township's residents are getting more and more digital friendly. New residents arrive with certain experiences that they expect from the Township as well.

Today, everything we do has a digital component to it, be it ordering a pizza or renewing your vehicle plate. These are regular activities that our residents do online using digital service offerings. Essa should focus on providing access to municipal services through digital means to its customers.

Transforming over-the-counter or over-the-phone services to digital, means enhancing your customer experience. Instead of taking time off work and driving to a Township office to receive a service, customers can now do it online from anywhere, any time. E.g., Online submission of Building Permit applications, making an online payment for a Parking Ticket.

The benefits are not only to the customer. After implementing these services, the Township would be operating the service with less human interaction, reducing the cost of the service delivery. Following are some benefits of digital services:

- Improve customer service and customer experience.
  - The customer does not need to visit a Township facility, the service is available 24/7.
- Reduce processing times.
  - The time it takes for the internal staff to process, approve, review etc.
- Improve process efficiency
  - Through self-service, the customer is inputting the data which would otherwise be entered by a staff member.
- Enable data analytics
  - Allow the Township to gather real-time data that help make better decisions.

The following Key Performance Indicators (KPI)s are recommended to measure the success of this Focus Area:

- Number of online services available on the Essa website.
- The percentage increase of online service requests compared to non-online service requests for the same service. For example, in 2022, there are x% more online parking ticket payments compared to 2021.
- The percentage of digital service offerings to non-digital service offerings in the Township. E.g., out of all public-facing services, x% are available online.
- Annual increase to the number of online services processed.
- Annual increase to the number of customers using online services.

- Customer satisfaction rating based on annual online survey results.

8.2.2. Digital Communications and Community Engagement

The area of communications and engagement has seen a significant change with the expansion of the internet, social media and mobile tools.

Residents expect real-time information on their smartphone. The Township needs to focus on expanding the use of online channels to communicate with its residents and to engage them. Digital engagement could be used for public meetings, public surveys, receiving public inputs on municipal projects, development, community planning, etc.

The digital channel is not only cost effective, but it also has a wide range. The social media platforms are multipliers that allow a message to be spread to large numbers of residents in a short time.

Here are some benefits of digital communications and community engagement:

- Cost effective channel of communication and engagement.
- Low setup time – a message could be prepared and sent out in a matter of minutes, unlike the print channel.
- Bi-directional – the online channel allows recipients to respond and provide feedback.
- A message can be replicated, shared, and multiplied through various networks and share features.
- The data collected from the digital channel can help improve the message and its attributes, e.g., the number of recipients, the amount of time spent by the recipient to read the message, demographic details of the message recipients, etc. are available for analysis.

The following Key Performance Indicators (KPI)s are recommended to measure the success of this Focus Area:

- The annual increase in the number of visitors to the Township's website.
- The annual increase in social media followers.
- The number of online feedback messages received annually.
- The number of re-tweets and shares of social media messages by recipients.

8.2.3. Digital Business Processes

Digital business processes are enabled through business solutions. Business solutions are a mandatory requirement to provide digital services online, therefore, this Focus Area is a prerequisite to providing digital services to residents.

A business process defines the sequential steps that are required to provide a service. Most times, business processes are cross-functional, meaning, they touch many internal departments. It is important to note that prior to digitizing a business process, the Township should review the current process and optimize it. Two of the common practices used for process

optimization are Lean Six Sigma and Business Process Re-Engineering. When a business process is defined, a clear start and an end point must be identified, e.g., making a payment is not a process – it is an activity within a larger process.

Following is an example of an end-to-end business process:

A customer requesting a marriage license to the point where the license is provided to the customer. This process includes, filling a form with all the required information, making the payment, providing the proof of identity to the point where a printed provincial license is provided to the customer.

A fully digitized marriage license process would look like:

- A customer visits the Essa website and searches for "marriage license".
- The customer is taken to a webpage that explains the steps required to obtaining a marriage license.
  - The prerequisites, payment amount, identification requirements, mandatory information needed in the form, how long it takes, how to pick it up, etc. are all available on the webpage.
- When the customer is ready to apply, they fill an online application form with all the information required to process the application, attach digital copies of identification, make an online payment using a credit card and submits the application.
- The system performs a mandatory data check to ensure that all required information fields are complete.
- The website provides a reference number and a receipt for the payment via email.
- A link is provided to check the status of the application.
- The payment has been deposited to the Township's bank account automatically.
- In the Clerk's department in Essa, the administrative staff receive a digital alert about the new request.
- The staff review the application and approve to proceed.
- The Township Clerk is alerted through a digital workflow.
- The Clerk reviews the application and add any changes and, with the click of a button, creates and prints the marriage license onto the provincial form.
- The digital workflow emails a digital copy of the license to the customer and the physical marriage license is mailed to the customer.
- The system tracks the license number and the details of the applicant for future processing.

The above example shows how a business process could be digitized from start to end. Some tangible benefits of such a digitized process are summarized below:

- Increased process efficiency – systems perform repetitive complex functions.

- Less manual work for internal staff.
- Staff time is saved providing additional capacity and cost avoidance.
- Quick turnaround due to increased process efficiency.
- Data tracking is available due to end-to-end digitized processing, e.g., the ability to track how long it takes for the administrative staff to review and confirm a request, ability to benchmark the cycle time from the submission of the application to the issuance of the license.

The following Key Performance Indicators (KPI)s are recommended to measure the success of this Focus Area:

- Percentage of end-to-end digitized business processes.
- Number of paper forms eliminated annually.
- Annual reduction in paper use and the print budget.
- Manual activities eliminated annually, due to digital business processes.
- Number of staff hours saved annually due to digital business processes.
- The cost of staff hours saved annually due to digital business processes.

8.2.4.   Digital Awareness

To develop digital services and digital business processes, it is also important to focus on improving the digital awareness of the staff, management and Township leadership. These skills and enhanced digital knowledge should be extended to the residents as well.

The digital awareness improvement allows the staff to look for digitization opportunities. A continuous pipeline of ideas should be built and encouraged among the staff. Digital skills should be a mandatory skill in new recruits. Continuous education opportunities and sharing of digital experiences among peers should be encouraged.

The digital awareness program should influence the corporate culture of the Township. The leaders in the organization should be equipped with sufficient digital skills to question every manual form, manual activity, duplication of effort, etc. The management team should be able to identify the most valuable digital ideas from the rest. "Digital" should be embedded into the DNA of the organization. Some key benefits of enhanced digital awareness are below:

- Ability to identify digital opportunities.
- Ability to lead digital transformation from the top.
- Ability to realize the benefits of data analysis.
- Evidence based decision-making.

The following Key Performance Indicators (KPI)s are recommended to measure the success of this Focus Area:

- Number of digital awareness initiatives implemented per year.
- Number of staff members who have taken a digital course annually.
- Number of digital ideas generated within a year.
- Number of digital ideas approved to be implemented annually.
- Number of successful digitization initiatives completed annually.
- Rating of digital awareness based on an annual internal staff survey.

8.2.5. Broadband Internet Access and Connectivity

The Digital Divide is real, especially in rural communities. Some areas do not have access to high-speed internet.

It is recommended that the Township work with partners to enhance the access to high-speed internet in the Township. With expanded online services to residents, the need for internet coverage increases. Multiple rural municipalities have partnered with private and not-for-profit organizations to resolve this issue.

There are challenges in connectivity between municipal buildings. A consistent high-speed network access is needed to connect all Township buildings in order to provide consistent access to the staff to carry out their activities.

Here are some of the benefits of providing broadband high-speed internet access and connectivity:

- All residents are connected to the internet.
- Ability to expand online services, communications, and engagement platforms to all residents.
- Ability to enforce certain services to be online only.
- Improved and consistent computing experience to staff.

The following Key Performance Indicators (KPI)s are recommended to measure the success of this Focus Area:

- Percentage of high-speed internet coverage within the Township.
- Percentage of Township buildings connected to the main network at the same speed and consistency as the main building.

Mobilizing the Strategy

9.0   Mobilizing the Strategy

This section speaks about how the Township should prepare for the implementation of ITDS. There are a handful of important changes required in order to help achieve a true digital transformation.

The following key areas require special attention.

9.1. Repositioning IT

The current IT services are provided by the Town of Innisfil IT department. The staff survey shows that the Township staff are very satisfied with the current level of service. This shared service model should continue. The current IT services are mostly related to hardware, network and some software products and mostly focused on break-fixes.

The Essa staff consider Innisfil IT as a contracted service. This needs to change.

The IT services must be repositioned as a full-service IT partner. Essa staff should feel that IT is an internal service that is always connected and available to them. The services should change from break-fix to strategic. Township leadership should be able to work cohesively with the IT Manager in digital decision-making and receiving advice. More focus should be placed in automation and digitization than break-fixes.

The following recommendations should be implemented to mobilize the repositioning of IT.

- A seat at the table – IT Manager should be invited to Township management team meetings in a regular manner.
- The physical presence of IT staff at the Township should be more frequent.
- IT staff should be accessible to the staff more regularly.
- IT advisory services should be utilized by the Township where staff are able to bring forward challenges and expect IT advice for the best suitable solution.
- IT should be available to plan strategic technology investments and projects.
- IT should provide more busines systems-related services such as process automation, workflow design, expanding existing systems across the Township, project management, etc.

The overall objective is to position Innisfil IT as a partner rather than a service provider.

9.2. Governance

The Township has a formalized cohesive decision-making process for technology decisions. A cohesive decision-making process allows the Township to invest in the most important aspects of the business with the highest return on investment. It reduces the likeliness of implementing duplicate and siloed business solutions.

The following recommendations should be considered:

- The Senior Management Team to act as the Digital Steering Committee (DSC). The detail responsibilities of the DCS are provided in Appendix 2.
- The IT Manager should chair the Digital Steering Committee with formalized agenda and frequent meetings, e.g., IT Manager is invited to the SMT meetings once every two months and the DSC agenda item of the SMT will be led by the IT Manager
- DSC should be responsible for the implementation and monitoring of the ITDS.
- The DSC should develop a set of KPIs to monitor the progress of the ITDS.
- The Township must develop a set of principles:
  - All new services must be digital.
  - All digital decisions must be made at the DSC.
  - Major digital investment decisions must be made by the DSC.
- The ideas and projects pipeline should be managed by the DSC.
- A project prioritization metric should be developed and applied to all new project ideas.

9.3. Funding

As explained in the <u>Financial Analysis</u> section, Essa has an opportunity to increase the technology use through increasing the technology funding.

In order to realize the benefits identified in the ITDS, it is vital to increase the investment in technology. The proposed funding increase could help meet the high levels of customer expectations and continue to provide additional improvements through annual budget considerations as given below:

- Increase the current technology investment level from 1.6% of the total annual operating budget to 2.5%. This is an increase of $118,000.
- Setup an IT capital budget through the budget process starting from 2022.
- Consistently increase the annual IT budget at a rate of 20% ($23,600) each year for the next 5 years. This infusion is recommended to gradually catch up with the historical accumulated under-funding of technology.
- It is recommended that the Township apply for the Municipal Modernization Program funding and other grant programs available through the Province and other organizations, as one of the avenues to fund the recommended budget increases.

Key Opportunities

10.0 Key Opportunities

The key opportunities identified as a result of the Discovery Phase have been categorized into the Focus Areas identified in the ITDS Focus Areas section. Specific projects and initiatives within these Focus Areas are listed below.

10.1. Digital Services

The primary focus of the Digital Services Focus Area is to improve customer service. These initiatives will enhance the customer experience and allow the Township residents to interact with the Township through the digital services from anywhere and at any time. The following digital services have been identified:

- Online Billing (eBills) functionality for tax bills, accounts receivable bills and water/wastewater bills. This functionality should provide residents the ability to receive their bills digitally and check their accounts' statuses online.
- Online payments (ePayments) functionality for residents to make payments through the Township website. Residents should be able to pay their bills, tickets, invoices, and other application fees through the website.
- Online applications with the ability to apply for permits, inspections, licenses, etc. through online forms. The following application types have been identified: Development Applications, Building Permits, Roads Permits, Service Orders and By-law Complaints.
- Convert the rest of the static non-fillable forms to fillable online forms with workflow. The Township website contains over 40 non-fillable forms that are used less frequently. These forms should be converted to online forms with automatic routing to the internal staff. New forms should be setup as online forms.
- Upgrade or replace the current website with a more modern and feature-rich website.
- Increase online map inquiries and self-service for residents. Specifically, property-related information should be integrated with GIS and made available to the public via the Township's website, e.g., zoning designations and property reports, etc.

10.2. Digital Communications and Community Engagement

The initiatives in this Focus Area are mostly aligned toward external customers. The main focus is to improve two-way communication between the Township and its stakeholders using digital channels. The following specific projects have been identified:

- Implement a public engagement feature on the external website. This should allow the Township to publish ideas and initiatives and receive feedback from residents. Residents should be able to sign up for certain types of items and be notified when new items are added.

- Increase the use of social media through Facebook, Instagram, YouTube, etc. to reach the customers who are more familiar with social media channels.
- Implement an intranet for the internal staff through Office365 SharePoint.

10.3. Digital Business Processes

Digitizing business processes will allow the Township to increase its efficiency, creating extra capacity and reducing the need for additional staff time to process customer requests. Especially in business areas with growth, digital processes allow the Township to handle the extra demand through automation.

The following business processes have been identified for digitizing:

- Potential expansion of the use of MOAR system to digitize the following business processes:
  - Parking ticket lifecycle management.
  - Animal licensing management.
  - Burn permits issuance and tracking.
  - Road permits such as Road Occupancy, Oversize Vehicles, etc.
  - Business license management.
  - Enable mobile inspections and end-to-end digitization of By-law complaints and building permits processes.
  - Automate the calculation of Development Charges (DC).
  - Implement a Customer Relationship Management (CRM) system where all requests (other than asset-related service requests) are entered, tracked, assigned until fulfillment.
- Implement the following business solutions:
  - An integrated asset and work order management system. Consolidating the MSAccess database, MESH system, Excel tracking systems and manual tracking of assets to include all aspects of asset management and work management within a comprehensive integrated system. The system should track the entire physical asset inventory, financial information, asset replacement, condition tracking, work orders, complaints and service requests, and capital planning and should be integrated with GIS.
  - A Council and Committee agenda management system.
  - Replacement of the MaxGalaxy online recreation program registration system.
  - Implement an electronic plan review system, e.g., BlueBeam
  - Implement the Interactive Ontario Building Code software for inspectors.

- o Provide self-service to staff (e.g., HRISMyWay). This should allow consistent digital tracking of staff vacation requests and time entry.
  - o Digitize internal staff forms including mobile forms, e.g., mobile forms for the Fire department. Investigate O365 Forms and Flow tools.
- Enhance the use of GIS through the following initiatives:
  - o Build an integrated view of property-related information for staff and the public. This map-based inquiry should allow a user to navigate a map of Essa, find a property and view and report on all activities and information related to that property. Information should include data from MOAR, FireHouse, GP Tax, GP Utility billing, etc.
  - o Geo reference physical assets. The physical asset inventory should be available on a GIS map and allow staff to perform geography-based asset-related inquiries.
  - o Map historical fire incidents and provide spatial analysis capabilities to the Fire department.
  - o Provide location-based collector apps for asset-related data collection in the field.
  - o Provide self-service GIS data entry and update capabilities to Township staff.
- Financial process automation in Great Plains (GP):
  - o Digitize the Accounts Payable process using the digital workflow functionality of GP.
  - o Automate the capital project reporting with PO commitments and true account balances.
  - o Enable eBilling and ePay features of GP.
- Implement a document management system. Investigate the opportunities within Office365 SharePoint platform.

10.4. Digital Awareness

The digital awareness Focus Area should improve the digital knowledge within the Township. The goal is to educate the staff, management, Council and residents about digital capabilities.

The following initiatives have been identified:

- Develop and implement a Digital Awareness Program for internal staff.
- Increase staff knowledge in the capabilities of existing business solutions: MOAR, GIS, GP, O365, etc.
- Develop and implement a public digital awareness campaign.

10.5. Broadband Internet Access and Connectivity

This Focus Area is a basic requirement in expanding digital services. Township staff should have consistent connectivity while the public should have access to high-speed internet. The following initiatives have been identified:

- The network and internet connectivity of all Township offices should be improved. Staff should have consistent access to the Township network and systems from all Township buildings.
- Expand Broadband high-speed internet access to residents
  - Review options to partner with and expand the existing Innisfil broadband initiative.
  - Opportunity to work with the County of Simcoe to expand the SWIFT funding options to enable expansion of connectivity options to rural areas
  - Identify options in the planning process to include fibre lines as part of the subdivision process

11.0 Conclusion

The citizen demands for convenient digital services are increasing. The residents are able to perform many day-to-day transactions via the internet from anywhere, anytime in a convenient and user-friendly manner. They expect and demand that the Township also adhere to this new normal. At the current stage, Essa's business processes are mostly dependent on antiquated paper-based systems.

The Information Technology and Digital Strategy (ITDS) is developed with the help of the staff and the leadership to enable such transformation. The Township should focus on the following five areas:

1. Digital Services
2. Digital Communications and Community Engagement
3. Digital Business Processes
4. Digital Awareness
5. Broadband Internet Access and Connectivity

By focusing on the above areas, the Township could expect the following benefits:

- Enables excellent customer service
- Improves customer engagement
- Improves the service delivery timelines
- Less duplicate data entry dues to integrated systems
- Addresses resident concerns in a timely manner
- Helps the environment
- Reduces the service delivery cost
- Creates capacity
- Increases Transparency
- Reduces the number of complaints received by the Council
- Helps make informed decisions
- Increases the accessibility and availability of services
- Helps deliver the Essa Corporate Strategic Plan 2019-2022

The ITDS has identified various initiatives in Section 10. The execution of these specific projects require that the Township build an environment with the appropriate leadership, resources and monitoring mechanisms. The following recommendations should be considered in order to mobilize the strategy successfully.

- Expand the existing shared service arrangements
- Reposition Information Technology with increased digital advice at the management level
- Implement technology governance through the Digital Steering Committee at the Senior Management level
- Increase technology investment

The Township has a unique opportunity with the Covid-19 pandemic at this point. Like most other municipalities, Essa could use this opportunity to take a leap into modernizing the service delivery model through technology. The investment in digital service today, could save staff time, cost of service delivery and enhance the customer experience in the future.

Appendices

13.0 Appendix 2 – Role of the Digital Steering Committee (DSC)

13.1. Introduction

A Digital Steering Committee (DSC) can take many different forms. For Essa, it is recommended that the Senior Leadership Team take on this role as these are important business decisions that the leaders of the organization must address.

With this new vision and plan, there is the opportunity to enhance the organizational understanding about what it takes to deliver successful technology solutions.

By having the leadership team make the critical decisions, they can be sure that all technology projects align with corporate goals and that solutions can be fully leveraged by multiple departments, reducing the need for many department-only solutions. Furthermore, the Municipality will work to ensure that selected initiatives are delivered successfully – using industry best practices around project management, business process design, and change management frameworks.

The Steering Committee should be responsible for three core functions:

- Priority setting, resource allocation, policy development and review, and approval of recommendations for key initiatives and strategic decisions
- Holding IT and the Departments accountable for service delivery, both operationally and for projects
- Annual review of the ITDS, IT program and assessment of value delivered to the organization

Terms of Reference (TOR) should be developed by the committee as one of its first tasks.

13.2. More specific DSC responsibilities:

- IT policy and IT standards review, approval, exceptions and enforcement
- Expenditure review and trends analysis
- Approval of major initiatives
- Major projects updates (top 5 projects) at defined milestones
- Approval of any project change above 25% (time, money, resources)

- Review the progress of the ITDS and make necessary adjustments based on organizational priorities

13.3. Mandate

- The committee shall meet at least six times per year.
- The committee shall review all proposals for IT investments with projected costs over $50,000.
- All proposals must be pre-reviewed for technological merit by IT.
- All proposals must be complete, according to the standard business case/project charter, to include clear definitions of business measures and benchmarks of progress. This will include cost/benefit analysis and clear calculation of Return on Investment (ROI).
- All proposals must align with the ITDS
- DSC has the authority to reject or defer any proposal which it deems not to have made a sufficient business case or which does not significantly contribute to the strategic goals of the Township.
- At each meeting, the committee will receive progress reports on all approved proposals. The committee can recommend the termination of any project which is not meeting its projected goals.
- Each year the committee will provide the CAO and Council with a report that will review project progress of the previous fiscal year and set a priority list of projects for the coming fiscal year.

Produced by

Perry Group Consulting Ltd.

www.perrygroupconsulting.ca

-- Trademarks acknowledged --

Municipal Modernization Program

Intake 2 Program Guidelines

WHAT YOU NEED TO KNOW

Ontario is continuing to help municipalities become more efficient and modernize service delivery.

Ontario's 405 small and rural municipalities can now apply to Intake 2 of the *Municipal Modernization Program* for funding under two streams. The **review stream** will provide funding for municipalities to undertake expenditure reviews with the goal of finding efficiencies and lowering costs in the longer term. The **implementation stream** will provide provincial cost-sharing for municipalities to undertake projects that increase municipal efficiency and effectiveness. Municipalities can apply under this stream for projects that implement the findings of previous reviews or other evidence-based reports.

Under both streams, municipalities can apply individually or jointly with other eligible municipalities.

ELIGIBILITY CRITERIA – REVIEW STREAM

To be eligible under Intake 2, a review stream project must:

1. Be a review of municipal service delivery or administrative expenditures by an independent third-party reviewer for the purpose of finding savings and efficiencies. The review project could take a number of forms including:

   - a line-by-line review of the municipality's entire budget; or

   - a review of service delivery and modernization opportunities; or

   - a review of administrative processes to reduce costs.

2. Result in a report by the independent third-party reviewer that provides specific and actionable recommendations for cost savings and improved efficiencies.

3. Begin field work no earlier than January 26, 2021, with a final report completed and posted publicly on the municipal website by November 30, 2021.

To be eligible for funding, the municipality must confirm that it has fully spent or allocated the unconditional modernization funding provided by the province in March 2019.

It is anticipated that most review projects will cost between $20,000 and $150,000. Higher funding amounts may be available for joint projects. Proposals will be reviewed on a case-by-case basis and funding amounts may depend on the available appropriation.

Priority may be given to projects that address one or more of the following priorities:

- Digital modernization
- Service integration
- Streamlined development approvals
- Shared services/alternative service delivery models

Municipalities will be eligible to receive funding up to the full amount of the third-party service provider's fees for the review. Municipal administrative costs, such as staff time, are not eligible.

The program will not cover review projects where:

- the goal is to identify opportunities for revenue generation or reductions in front line services; or
- the review does not result in a formal report prepared by a third party that the municipality is prepared to make publicly available online; or
- the object of the review extends beyond municipal accountability; or
- the review is related to requirements under the asset management regulation.

ELIGIBILITY CRITERIA – IMPLEMENTATION STREAM

To be eligible under Intake 2, an implementation project proposal must:

1. Be based on demonstrated evidence of savings the municipality intends to realize through the project;

2. Begin no earlier than January 26, 2021 and be completed by September 30, 2022;

3. Include a high level workplan with project milestones;

4. Include a commitment to providing a final report that forecasts annual savings and other efficiency and effectiveness outcomes for at least three years as a result of project completion

5. Include a commitment to reporting back one-year post project completion with actual savings over the course of the year and a revised forecast of annual savings and other efficiency and effectiveness outcomes for the following two years.

To be eligible for funding, the municipality must confirm that it has fully spent or allocated the unconditional modernization funding provided by the province in March 2019.

Priority may be given to projects that address one or more of the following priorities:

- Digital modernization
- Service integration
- Streamlined development approvals
- Shared services/alternative service delivery models

The program will not cover projects where:

- the expected outcome is a reduction in front line services; or
- the expected outcome would not result in efficiencies or cost savings; or
- the municipality would not be prepared to support any ongoing maintenance costs resulting from the project.

COST SHARING AND ELIGIBLE COSTS – IMPLEMENTATION STREAM

The cost of implementation projects will be shared between the province and the municipality. The province will contribute a greater portion for projects within municipalities with fewer households according to the following thresholds.

Number of households in the municipality (2020 MPAC data)	Maximum provincial share of project costs	Minimum municipal share of project costs
0 - 5,000	75%	25%
>5,000	65%	35%

It is anticipated that the provincial share of most projects will be between $20,000 and $250,000. Higher funding amounts may be available for joint projects. Proposals will be reviewed on a case-by-case basis and funding amounts may depend on the available appropriation.

Major capital expenditures are not eligible for funding as project costs. Regular municipal staff costs that are part of the municipality's annual budget are not eligible for provincial funding as project costs. However, additional temporary hiring (including internships) for an implementation project could be considered as an eligible cost.

Other eligible costs could include amounts paid to fee-for-service providers, software licenses, systems development and training.

HOW TO APPLY

1. Log onto the Transfer Payment Ontario (TPON) system (<u>Ontario.ca/getfunding</u>) and select the program stream you wish to apply for (review stream, implementation stream);

2. Complete an Expression of Interest form for the appropriate stream of the program.

3. Ensure that you have uploaded the required attachments and completed the municipal attestation in the Expression of Interest Form.

4. Submit your completed application through TPON **by March 15, 2021**

HOW IT WORKS

The ministry expects to advise municipalities of the outcomes of their applications in May 2021. If your application is approved, a proposed transfer payment agreement with the ministry will be sent to confirm the funding amount and set out the terms, including reporting requirements and a payment schedule. Municipalities can expect to receive an initial payment following execution of a transfer payment agreement.

PROGRAM TIMELINE

March 15, 2021	• Submit your Expression of Interest and any supporting documentation to Transfer Payment Ontario (TPON) at www.ontario.ca/getfunding
May 2021	• Learn whether your application is approved. If it is approved, enter into a **transfer payment agreement** for project funding, and receive an **initial payment** once the agreement is executed.
August 2021	• **Review Stream:** Submit an interim project status report
Quarterly starting October 2021	• **Implementation Stream:** Submit quarterly project status and expenditure reports
November 2021	• **Review Stream:** Post the **third-party reviewer's final report** online and submit your **final project status report.** This report will include: a hyperlink to the publicly posted third-party reviewer's report; the amount paid to the third-party reviewer and a copy of the invoice; a statement of the total amount of expenditures reviewed and the total amount identified as potential savings; and a 250-word abstract of the project and its findings.
by Fall 2022	• **Implementation Stream:** All implementation stream projects are completed. Submit final reports including copies of invoices.

132

9a

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FOR MORE INFORMATION

Please direct program questions to your <u>Municipal Services Office Municipal Advisor</u> or <u>Municipal.Programs@ontario.ca</u>.

For support with the Transfer Payment Ontario (TPON) system contact the Transfer Payment Ontario Client Care from Monday to Friday 8:30 a.m. to 5:00 pm, except for statutory holidays:
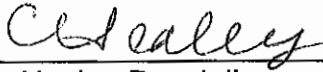
- <u>Tel: 416-325-6691</u>
- <u>Toll-free: 1-855-216-3090</u>
- <u>TTY: 416-325-3408</u>
- <u>Toll-free TTY: 1-800-268-7095</u>
- Email: <u>TPONCC@ontario.ca</u>

133

TOWNSHIP OF ESSA STAFF REPORT

STAFF REPORT NO.: CAO009-21

DATE: March 3, 2021

TO: Committee of the Whole

FROM: Colleen Healey-Dowdall, Chief Administrative Officer

SUBJECT: Strategic Plan Status Update

RECOMMENDATION

That Staff Report CAO009-21 be received for information.

BACKGROUND

Council adopted a Strategic Plan with this term of Council, in 2019. It seems appropriate at this point in time, to remind Council of their adopted priorities and to provide a status update.

COMMENTS AND CONSIDERATIONS

A Strategic Plan is a tool used to communicate the municipality's vision and goals. It ensures that everyone is altogether on one page. Council should feel free to provide direction/discuss priorities/make changes as it deems necessary.

FINANCIAL IMPACT

No direct budget impact although actions impact on budgets.

Manager of Finance or Deputy Treasurer Approval: _____

SUMMARY/OPTIONS

Council may:
1. Take no further action.
2. Direct staff in any course of action to alter priorities.

134

CONCLUSION

Option #1 is recommended.
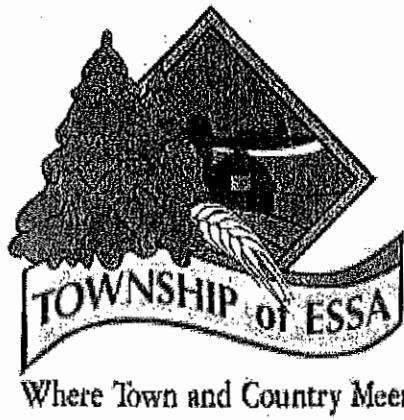
Respectfully submitted:

Colleen Healey-Dowdall
CAO

Attachments:
Strategic Plan 2019-2022 with status update on action items

Strategic Plan

2019-2022

10a

Table of Contents

137

Overview

Council and senior staff for the Township of Essa held a strategic planning session together, in public, on April 2nd, 2019. The aim of the day was to think about the future and where we are going, as a community and as a municipal organization.

Everyone was able to participate in an open and relaxed forum. A situation analysis was carried out with the results summarized below (the order does not reflect any priority whatsoever).

Strengths - What do we Value Most about Essa; and

What are the Positive Conditions and Initiatives that have been Created in Essa?

1. **Taxes**

- Safe community with <u>low taxes .... low taxes mentioned often (6 times)</u>

- Good value for taxes

2. **Parks (6 clear responses that parks/green spaces valued)**

- Gets families out at no cost

- Trail improvements welcome

- Nottawasaga River can be focus since unique and beautiful

- Green spaces, parks, trails, gardens.... All add to the municipality, people enjoy/they bring pride

- Splash pads well used and enjoyed

- Dog parks well used and enjoyed

3. **Roads (4)**

- Good roads, road safety and improvements are important

4. **Service**

- Burn permits are popular (2)

- Level of service considered good (2), staff friendly and helpful

- Council values staff

- Public happy with medical clinic

- Public transportation helping with isolation

- Events i.e. Essalicious/Farmer's Market growing in popularity

- Increases in number of businesses is valued (2)

5. **Community Feel**

- Small town feel, know your neighbours highly valued

- Small community feel and quality of life are very important

6. **Attitude (3)**

- We value working together/cooperation

Weakness - What can we be Doing Better – within our Control?

1. **Investing in Capital**

- Should invest more and more consistently; adhere to a standard

- Prepare realistic long range plans

- Measure results and report on metrics

- Ensure financial sustainability

2. **Service**

- Rely on technology more

- Reduce duplication in planning

- Look for efficiencies within

- Look for partnership opportunities with neighbours

- Increase recreation programs

- Streamline processes

3. **Communication**

- Spread news about events, work on communications

- Improve on broadband/internet

- Develop a community brand

- Improve on media releases/increase ads/spread the word

- Ensure that website and Council pages are easily accessible and informative

- Develop a different newsletter

4. **Take responsibility for County Roads to ensure safety and consistency**

- Request more control over County Roads and impose local improvements to these roads to reduce complaints from the public, ie install pedestrian crossings in Thornton along County Roads

5. **Parks**

- Plant more trees

6. **Staffing**

    - Listen to the ideas of staff

    - Undertake a pay review/comparison

    - Recognize staff contributions, achievements and milestones

    - Celebrate holidays/social events

    - Provide training including on opportunities and cross-training

    - Ask staff to suggest redundancy

Opportunities - Trends may be beyond our Control?

1. **River and trail opportunities**

    - Nottawasaga River

    - Rail trail leading to Collingwood, County assessing

    - Public seeking green space and developed public spaces, with good facilities/amenities

2. **Transit**

- Regional bus system

3. Funding

    –   Other levels of government looking for savings

    –   Need to find efficiencies

    –   Change to development charges (community benefits)

    –   Need to develop Asset Management Plans, Climate Action Plans, Community Safety Plans, Sourcewater Protection Plans

    –   We work well with neighbours but what about other levels of government

4. **Second Suites**

    –   Required to provide for apartments/second suites

Threats - Trends beyond our Control?

1. Costly housing/ daily affordability

2. Senior housing and affordability

3. Aging population and health care

4. Ontario government regionalization

5. Loss of autonomy

6. Climate change- dramatic weather events

7. Reduction in base funding

8. Funding services shrinking

9. River erosion

10. NVCA out of planning – keep in watershed

11. Cost of services to residents

Strategic Plan Process

The municipality deals with a number of issues ranging from operational concerns to high level concerns such as the regional government review and the County of Simcoe's municipal comprehensive review. The Township has identified which areas are of greatest interest to it, to ensure future success.

Council for the Township of Essa has agreed, at its October 16th Council meeting, that the following 5 major issues are most important to influence the changes desired of Council.

1. Roads and Transportation
2. Recreation and Green Development
3. Customer Service
4. Governance
5. Finances and Funding

142

Vision, Mission and Goals

A Strategic Plan contains the following elements: a vision, mission and goals. The Township's mission will be achieved through its goals and each goal is associated with actions to achieve desired outcomes (listed in no particular order).

Vision	Mission	Goals
Essa: Where town and country meet	Essa Township will be a place where town and country meet in a safe and healthy environment to serve you with a responsible plan going forward.	The goals are the results that are desired to be achieved over the next 3 years (to 2022 and the next term of Council).

Strategic Actions to Support the Goals

Goal 1: Good and Safe Roads and Transportation

Desired Outcomes:

- Public transportation helping with affordability and social issues (ie isolation)

- Good roads, road safety and improvements - desired to have roads which are safe for motorists and pedestrians/improved infrastructure

- An improved transportation network with linkages

- Support for active transportation to provide for choice in mode of transportation

- To improve on the transportation system including coordination with County roads

Strategic Actions

Action	Target Due Date	Comments
Create a focus group to collect local ideas and comments – Traffic Advisory Comm (TAC)	Completed in 2020	Include citizens from across the municipality; TAC created and meets regularly
Traffic calming measures	2020 budget $12,500 2021 budget $110,000	
Road improvements, including crosswalks	2020 budget $200,000 2021 budget $200,000	Centre St and Angus Crosswalks; Thornton pedestrian crossing installation $165,307
Implement an active transportation strategy and plan	Review of standards and practices underway in 2021	Roads review in 2021 $80,000; County Transportation Master Plan underway; Infrastructure Master Plan underway in 2021

Strategic Actions to Support the Goals

Goal 2: Varied Recreation and Green Development

Desired Outcomes:

- To improve on the Township's parks and recreation service providing more programs or programs which are popular
- To develop green public spaces and preservation of green space/features with amenities to promote enjoyment of public spaces and the natural environment
- Trail improvements/increased trails and related opportunities to promote natural recreational opportunities in Essa

Strategic Actions

Action	Target Due Date	Comments
Draft a master plan	2021 – 2022	Working on an inventory of assets plus needs (2 separate initiatives)
Develop a sense of pride	Each year	Employee engagement citizen involvement
Ensure programs are popular and in demand/modify to suit demographics	Each year	Programmer encouraged to do this
Create partnerships with community organizations	On-going relations	Lions, Legion, Private recreation providers, etc; on-going outreach
Increase attendance at community events	Each year	Tree lighting ceremonies, farmers markets, Edible Essa, etc; on hold with COVID
Plant more trees	Each year	Working with South Simcoe Streams and NVCA/HCC
Make trail improvements	Each year	Wayfinding signage to be proposed 2021-2022 as a part of a grant application
Make park improvements	Each year	Refer to budget 2021; basketball, LED lights, play equipment, etc.

Strategic Actions to Support the Goals

Goal 3: Customer Service Excellence

Desired Outcomes:

- To enhance our customer service so that residents feel well-informed
- To ensure that we are known to be friendly and helpful
- Easy to access information
- More/better use of technology
- Improved communications with easy to read newsletters and publications

Strategic Actions

Action	Target Due Date	Comments
Better communication/use of social media	Each year	Facebook, Twitter accounts; regular posts
Easy to read newsletter	2020	Newsletter updated with current content; posted on website
Easy to read budget updates	2020	Insertion of pie chart and other graphics into updates
Better use of software to enable efficiencies	2021	IT Strategic Plan to contain recommendations
Identify resources for dedicated communications	2021	Dedicated staff member for communicating
Create opportunities for increased citizen involvement	Each year	Zoom meetings allow meetings to be more accessible

146

Strategic Actions to Support the Goals

Goal 4: Good Governance

Desired Outcomes:

- To find efficiencies in service delivery to ensure optimal effectiveness
- To streamline processes
- To eliminate duplication
- To ensure that the municipality is responsible and accountable to its taxpayers
- Partnerships to cost-share in service delivery

Strategic Actions

Action	Target Due Date	Comments
Undertake an efficiency audit	2022	
Promote cross-training	Started	On-going given constant staff turnover
Promote partnerships	2020	On-going meeting with south Simcoe partners
In-house efficiencies/suggestions encouraged	Each year	Staff encouraged to make suggestions, some suggestions received
Means to ensure effective deployment of staff	Completed	Requests of Council funneled through the CAO/Department Head; Council policy in effect

147

Strategic Actions to Support the Goals

Goal 5: Responsible Finances and Funding

Desired Outcomes:

- Maintain low taxes but continue to support asset management and long range planning
- Seek out grant opportunities that open the door to the municipality
- Responsible spending without waste
- An asset management plan that is supported and a long range capital plan to provide for certainty

Strategic Actions

Action	Target Due Date	Comments
Dedicate funding to replacement of assets	Began in 2019 2020 budget $343,000 2021 budget $343,000	
Long range capital plan	Began and restarted in 2020	Infrastructure Master Plan underway: water and wastewater plan adopted December 2020
Maintain low taxes but ensuring good value	Each year	Essa's operating expenses at $18,605,762; Total levy required is $8,097,650
Establish standards	2020	Council decision to put 3% to asset management funding each year

148

Priority Strategic Actions

All activities listed above are important and should begin right away if not already started. Each Manager should review all items with their staff and report to the CAO on implementation. Some actions are straight-forward and on-going and others require development. Some may involve further Council discussion.

Implementation and Monitoring

The Strategic Plan will be implemented by staff under the direction of the CAO, and monitored by Council. On an annual basis, Council will review the progress on the strategic actions through a report prepared by the CAO. Performance measures should be quantifiable, measurable and focused specifically on the strategic actions. The report may also identify new issues and challenges that may require new or updated strategic actions.

150