

# Township of Bonfield (ToB)

## Digital Strategy Roadmap

Phase 1: Current state assessment

October 7, 2021



**Matt Ambrose**  
Partner – Consulting  
Digital Strategy

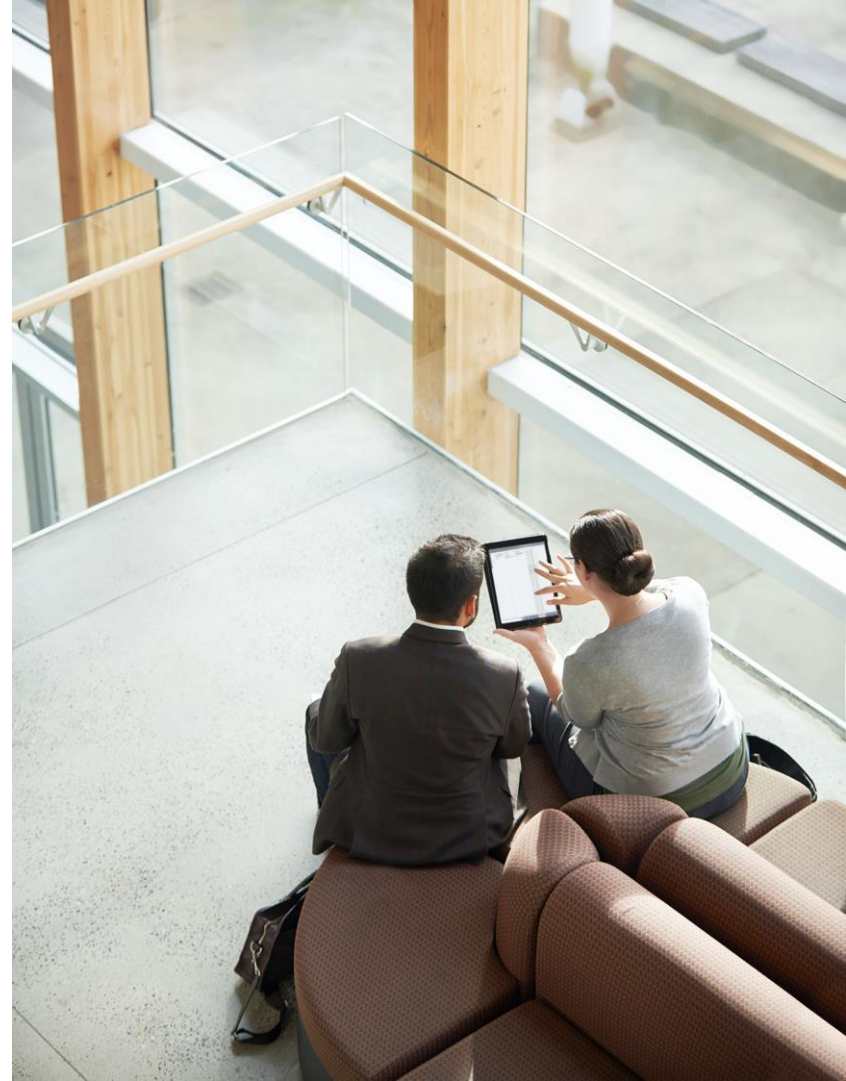
**Dean Leesui**  
Senior Manager – Consulting  
Digital Strategy

**Olya Bogojevic**  
Manager – Consulting  
Digital Strategy

# Content



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- ▶ Business objectives
- ▶ What we heard
- ▶ Current state assessment
- ▶ Phase 2 considerations and next steps
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# Approach and timeline

## Phase 1: Project Initiation (~3 - 4 weeks)

## Phase 2: Future State Vision (~3 - 4 weeks)

## Phase 3: Options & Recommendations Roadmap (2 weeks)

- Kick-off the project to confirm its objectives, scope, approach, schedule and contributors
- Gather and review available relevant documentation
- Conduct interviews with identified stakeholders to develop an understanding of the township's:
  - Services, operating structure, strategic objectives and business needs
  - Digital capabilities in support of: resident experience, employee experience, process automation, business intelligence, etc.
  - IT landscape: applications, infrastructure, security
- Assess the Township's current digital maturity and identify strengths, weaknesses and opportunities
- Validate the report with the project committee

- Identify municipal digitalization trends relevant to the Township
- Identify potential initiatives to improve the Township's digital capabilities based on needs and trends and outline expected benefits
- Define the operational, organizational and technology changes required to enable the digital initiatives, as well as high-level efforts and costs
- Review and prioritize the proposed initiatives with the Township's stakeholders
- Formalize the prioritized initiatives (objectives, scope, prerequisites, budget, etc.)
- Validate the digital initiatives portfolio with the project committee

- Sequence the initiatives into a coherent roadmap considering the Township's financial, human and operational constraints, as well as interdependencies between initiatives
- Develop KPIs to measure the plan's success
- Validate the roadmap, overall budget and KPIs with the project committee

- Project work plan
- Current State Assessment Report

- Prioritized Digital Initiatives Portfolio

- Digital Roadmap

Key Activities

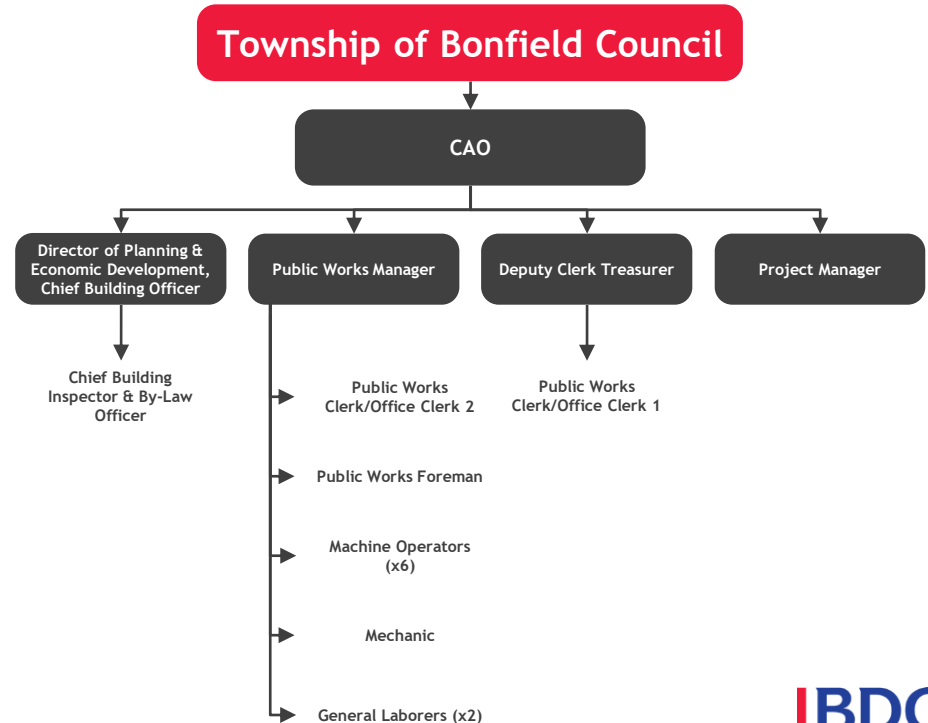
Deliverables

# State of the Township

*The Township of Bonfield (ToB) has made important changes to its processes over the past few years. With significant impending personnel changes, the Township ready for the next step towards digitization and greater overall efficiency*

## Key highlights

- ▶ Population of ~2,000 and is catered to by an office of 5 employees
- ▶ Customer service is a defining feature of the nature of work
- ▶ Good financial stability because of a new website that makes tax collection much easier
- ▶ 3 senior members are retiring by the end of 2021, creating a need to further improve digital infrastructure and facilitate knowledge transfer
- ▶ Received the NOHFC and FedNor grant of \$1.2M to improve waterfront and public parks





# What we heard

Interviews with each team member across the organization along with the MSP describe the following high-level issues, summarized by a set of recurring themes.

Poor internet access is slowing down digital transformation across township and its residents

Many residents are older and do not have internet access at all or don't have enough knowledge on how to use technology that they have

There is a reluctance to switch to new technologies caused by inertia of habit and comfort with archaic or paper-based systems

Document management is inefficient and time consuming because much of it is still in paper and is required to be for record management

There is not enough governance and/or policies in place for communication and otherwise. Time is wasted in duplicated efforts due to lack of structure

The office is understaffed and everyone wears multiple hats on a regular basis to get work done which causes unnecessary stress

Although work culture is great, collaboration between departments are not always smooth since they often operate in different technologies

There is a fear of continuity and succession planning since knowledge transfer infrastructure doesn't exist

Communication and approvals take longer than needed because approvals from the council and the mayor are continually required

On-going formal financial planning with scenario based or what-if forecasting

RECURRING THEMES

- Slow digital progress due to sub-optimal internet access
- No one source of truth because departments do not coordinate their IT
- Storage issues and errors caused by reliance on manual / paper-based processes
- Slow IT improvement caused by discomfort with new technology adoption
- Inefficiencies created through bureaucracy and politics

# Business objectives

*In discussion with ToB leadership and taking into consideration the organizational priorities going forward, the following key business objectives have been identified to guide and influence the analysis toward short and long term improvement opportunities.*



## PROMOTE CUSTOMER-CENTRIC CULTURE

ToB does a great job of being service oriented. This needs to stay central in business objectives.



## BECOME DIGITALLY DRIVEN

Make document management simpler and more efficient by digitizing as much of the data and processes as possible.



## STREAMLINE PROCESSES

Standardize systems, software and processes to allow for seamless communication between various teams and departments.



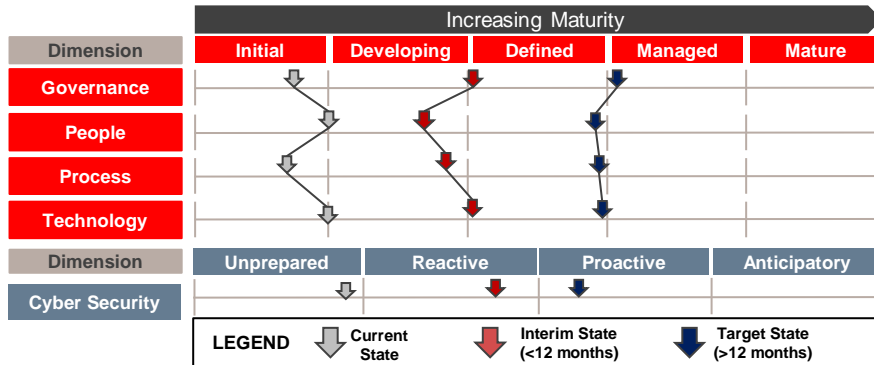
## STRENGTHEN TECHNOLOGY ADOPTION

Promote comfort with technology among the council and township residents to help drive a shift to a digitally driven organization

# Current state of IT/Cyber- Methodology & Maturity

Across key dimensions of assessment, the following interim & target state maturities have been defined for ToB

		Increasing Maturity				
Technology	Initial	Developing	Defined	Managed	Mature	
		<ul style="list-style-type: none"> <li>Processes disorganized; inconsistent, chaotic</li> <li>Processes not adequately defined/documented</li> <li>Limited/no tools in place</li> <li>Silo-ed knowledge/info; limited corp. memory</li> <li>Multiple roles/responsibilities in one position</li> </ul>	<ul style="list-style-type: none"> <li>Some repeatable processes; not applied consistently</li> <li>Limited formal communication of processes/policies/ procedures</li> <li>Tools introduced to enable operations</li> <li>Basic definition of roles/ responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>Processes formalized/ documented; standardization, integration</li> <li>Policies/procedures in place; training applied</li> <li>Tools supporting processes</li> <li>Roles/responsibilities formally defined</li> </ul>	<ul style="list-style-type: none"> <li>Operational/performance benchmarks/KPIs established</li> <li>Monitoring performance/ continuous improvement; feedback</li> <li>Consistent/effective tools utilization/optimization</li> <li>Resource alignment to repeatable/consistent processes</li> </ul>	<ul style="list-style-type: none"> <li>Decisions driven by accurate/consistent/timely info</li> <li>Proactive performance mgmt; continuous improv. focused</li> <li>Cross-org. integration of processes; optimized resource alignment</li> <li>Proactive review of tools/ systems performance</li> </ul>
Cyber	Unprepared	Reactive	Proactive	Anticipatory		
	<ul style="list-style-type: none"> <li>Lack necessary info (i.e. to take effective action); unaware/unable to respond to current/emerging issues</li> </ul>	<ul style="list-style-type: none"> <li>Basic platforms/structures to react to bus. req's; cannot proactively prevent problems from arising</li> </ul>	<ul style="list-style-type: none"> <li>Has platforms/structures &amp; organizational processes to proactively address current issues/challenges</li> </ul>	<ul style="list-style-type: none"> <li>Has platforms/structures &amp; organizational processes to proactively address future issues/challenges</li> </ul>		



**Notes:**

- Opportunities to improve maturity provided in next phase, focused on Interim state
- Maturity indicators provide a notional assessment only; defining directional goals across key dimensions

## Summary

- Organizations need not strive to be at the highest level of maturity across all dimensions to reach their objectives
- Interim/target states are reasonable expectations given organizational context (e.g., size, culture, demographics, needs, expected growth, corporate objectives, etc.)
- People/Process dimensions typically lag technology capabilities especially in ToB's case due to the friction with technology adoption (i.e., adoption/alignment will improve over time with proactive/strategic change management).
- On-going investments in tech will lead to changes in processes, people, and habits, putting change management in the forefront
- Greater discipline/rigor at governance level is required to provide necessary direction and prioritization of investments (i.e., IT spend/optimization/value); rapid progress can be made toward interim state
- Target State should see proactive governance/oversight; processes formally defined/ documented, repeatability; technology leveraged effectively for operational and data-driven enablement (i.e., insightful reporting)

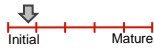


# Summary findings

Against dimensions of the maturity model, the following are key findings and implications for ToB



## Governance



- Lack of formal org-wide business governance, structure & planning (e.g., cross-department communication, file share, new employee training)
- Limited visibility/transparency (e.g., KPIs, measurable objectives, report accuracy)
- Lack of consistency, standards, business alignment, strategic enablement (i.e., data, system and integration fragmentation and complexity)
- Limited org-wide approach/strategy for change management (i.e., cross-departments such as public works and HR)
- Lack of cyber security protocols (e.g., in the event of a malware attack)



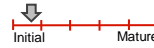
## People



- Openness to upgrading and streamlining processes and procedures i.e., leadership among other municipalities
- Collaborative team culture
- Some capacity constraints exist (e.g., Baker system bugs/issues not addressed in timely fashion; reactive to problems)
- Potential obstacles to change (i.e., long-term staff have done things same way for a long time)
- Systems, processes, inefficiencies adopted from legacy efforts (e.g., comfort with CGIS; “keep lights on”; maintain status quo due to prior complexity)



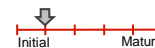
## Process



- Lack of standardized processes, procedures, templates (i.e., “everything is an anomaly”)
- Highly manual/labor-intensive processes (e.g., manual entry of budget numbers into Baker system)
- Redundant, fragmented processes (i.e., using both Citywide and Baker systems to track timesheets/payroll)
- Limited tools/monitoring; lack of formal SLAs/SLOs
- Some processes in place (e.g., CAB); lack of org-wide PMO (e.g., PMO department needs better communication, file and collaboration management procedures)
- Lack of formalized engagement with business/functions for ongoing needs/challenges



## Technology



- Fragmented application/integration landscape (i.e., some over-complex/over-engineered integrations; no seamless integration)
- Some security concerns (e.g., maintenance of password books, lack of audit trails)
- Tightly-coupled system/application architecture (i.e., upstream/downstream dependences; costly to change/manage/support)
- Extensive ongoing efforts/progress to modernize (e.g., cloud/digital-first, SaaS, managed environments)
- Fragmented data across systems (e.g., lack of single-source-of-truth; silo-ed data within Baker, Excel, and Citywide)

Summary findings

Implications

- Reduces effective decision-making (i.e., expertise resides with senior team members such as Deputy Clerk Treasurer)
- Potential disruption to operations (i.e., IT breaches)
- Limited visibility on cost-value of IT investments
- Increases financial/operational risk
- Reduces agility/adaptability to ongoing changes in organization

- Business continuity risks (i.e., from knowledge/expertise residing within individuals rather than within corporate memory)
- Obstacles/risks to change/adoption of new systems and processes (e.g., increasing costs, reducing operational rigor)
- Reduced collaboration

- Inefficient resource utilization, optimization (i.e., wasted effort/time on activities that are duplicated across various systems)
- Reduced scalability/flexibility (e.g., decreases ability to adapt to emergencies, IT breaches, impacting events [e.g., COVID], etc.)
- Limits visibility (i.e., understand weaknesses/gaps, leverage opportunities for improvement)
- Time spent on replaying to emails and looking for files vs doing analysis and being more proactive

- Reduces ability for timely, accurate, reliable information (i.e., for confident executive decisions)
- Increases cost/complexity (e.g., application upgrades, maintenance, support)
- Increasing inability to meet organizational/citizen demands, needs, expectations and challenges of future industry, technology changes
- Multiple providers (internet, email, systems) can raise up risk of cyber attack



Legend: Baker Baker & Associates, Microsoft Excel, Citywide, cgis CIGS, YouTube, Website

Legend: Current solution is sufficient, Current solution insufficient/cumbersome, Process lacks solution/manually done

# ToB Business capability map (BCM)

Municipal strategy	Sustainable urbanism	Maintenance of the territory	Engineering and environment	Economic development	Registry and legal affairs	Leisure and community life	Citizen relations and communications	Administration and finances	Human resources	Information technology
Strategic planning	Sustainable land use planning	Daily maintenance of the territory (park, lighting, roads, etc.)	Planning of works (repair and new infrastructure)	GIS mapping	Secretariat and drafting of the minutes of the meetings of the municipal council and the executive committee	Volunteer management	Support for internal and external communications	Financial planning	Recruitment, staffing and access to equal employment	IT procurement and implementation
Governance	Arrangement of urban and natural functions (economic, social, recreational, etc.)	Collection of garbage and recyclable and compostable materials	Execution of works	Building and planning	Follow-up of files with the responsible departments	Management of parks and sports, cultural and community facilities	Promotion and awareness of the population	Accounting and Treasury	Training and organizational development	IT infrastructure management
Organizational performance	Management and issuance of permits	Design of landscaping work plans	Monitoring of works	Work order tracking			Social media presence and engagement	Taxation and collection	Professional relations and management of working conditions regimes	IT security management
Project management		Coordination of landscaping work	Management of partnerships (external suppliers, ministries, etc.)	Asset management			Council meeting broadcasting	Financial Evaluation	Remuneration and job evaluation	User support and change management
				Capital asset planning				Report creation and filing	Health and security at work	
									Payroll production and benefits management	

Accountability  
Documentation management

Note:

- Functions that "lack solution/manually done" may be addressed by basic workarounds within existing solutions or improvement/standardization of manual processes
- Solutions that are currently "sufficient" for some functions may still need to be upgraded and/or replaced over time (i.e., not necessarily an indication of maturity to fulfill long-term requirements)
- "Solution not essential" denotes functionality that is not necessarily critical in the short-term from an automation standpoint (and indicated as low importance by stakeholders), but is a potential capability anticipated in the medium-to-long term



Legend:

- Baker Baker & Associates
- Microsoft Excel
- Citywide
- CGIS
- YouTube
- Website

Legend:

- Current solution is sufficient
- Current solution insufficient/cumbersome
- Process lacks solution/manually done
- Solution not essential/manually done

# General Business capability map (BCM)

Municipal strategy	Sustainable urbanism	Maintenance of the territory	Engineering and environment	Economic development	Registry and legal affairs	Fire and civil protection	Leisure and community life	Police	Citizen relations and communications	Administration and finances	Human resources	Information technology		
Strategic planning	Sustainable land use planning	Definition of cleanliness standards for territory	Planning of works (repair and new infrastructure)	Definition of city's economic policies	Management of registry activities	Rescues during disasters (accident victims, etc.)	Organization of leisure activities and special events	Maintenance of peace and public security (ppt & goods)	Support for internal and external communications	Financial planning	Recruitment, staffing and access to equal employment	IT strategy and enterprise architecture		
Governance	Arrangement of urban and natural functions (economic, social, recreational, etc.)	Daily maintenance of the territory (park, lighting, roads, etc.)	Execution of works	Community-verified icon	Legal affairs management	Fire risk assessment (and other disasters)	Assistance to partner organization from associations	Prevention and control of crimes and violations of municipal laws and regulations	Promotion and awareness of the population	Accounting and Treasury	Training and organizational development	IT procurement and implementation		
Organizational performance	Professional support and technical expertise for the realization of private and public projects	Collection of garbage and recyclable and compostable materials	Monitoring of works	GIS mapping	Management of access to information	Emergency organization	Volunteer management	Investigations and inspections (perpetrators of crimes and offenses)	Social media presence and engagement	Taxation and collection	Professional relations and management of working conditions regimes	IT application management		
Management of links between elected officials and the municipal administration	Management and issuance of permits	Design of landscaping work plans	Management of partnerships (external suppliers, ministries, etc.)	Building and planning	Management of the municipal court	Investigations and inspections (causes of fires)	Management of parks and sports, cultural and community facilities	Collaboration with other services	Council meeting broadcasting	Financial Evaluation	Remuneration and job evaluation	IT infrastructure management		
Project management		Coordination of landscaping work		Work order tracking	Secretariat and drafting of the minutes of the meetings of the municipal council and the executive committee	Implementation of measures to protect people and safeguard property	Development of social and community services			Administrative Support	Health and security at work	IT security management		
				Asset management									Follow-up of files with the responsible departments	Accommodation assistance
				Capital asset planning										Help for disaster victims
Accountability														
Documentation management														
Service management														
Business intelligence														

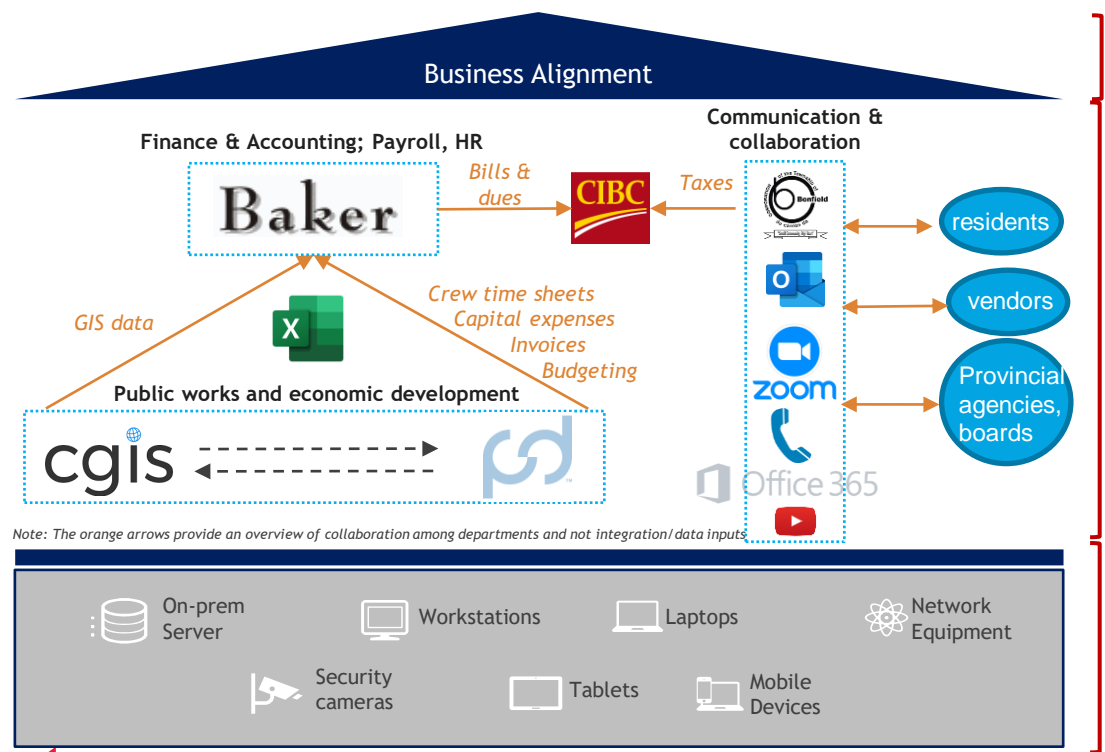
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# Current application landscape

Depiction of solutions across departments and flow of information using manual, communication, and file-sharing tools



Note: The orange arrows provide an overview of collaboration among departments and not integration/data inputs

## Governance

### Summary findings

- Lack of established protocols make for tribal knowledge to be concentrated in individuals rather than the organization

## Applications

(Not including basic business applications, e.g., Windows, MS Office, etc.)

- No standard file sharing methodology
- Document storage happens physically
- Office 365 is available but full suite of tools isn't being leveraged
- Communication channels aren't consolidated and standardized
- Duplication of data and efforts over multiple systems
- Manual data transfer causes human error

## Infrastructure

- Many/most of the workstations are old hardware
- Laptops aren't available to everyone, restricting work to one location or slow remote work
- Security cameras are old hardware

# Considerations

**Promote business continuity and governance** - With small teams, departure of any team members creates significant business continuity risk if not addressed

- ▶ Greater rigor/formalization of governance to transfer individual knowledge to organizational knowledge and establish cyber attack policies; reduce operational risk
- ▶ Improved collaboration and communication with other municipalities could provide opportunities for knowledge transfer
- ▶ Change management and readiness for both internal and external stakeholders needs to be at the forefront of transformation effort

**Strengthen, rationalize, and modernize mission critical applications** - Systems and application needs to enable future proofing to allow for agility and adaptability in the face of technological changes

- ▶ E.g., Baker system is serviced by one individual, posing a severe risk to continuity
- ▶ Systems need to be designed for the benefit of positions/roles rather than individual people
- ▶ Applications have capability overlaps and unused functionalities. Streamline process clutter and communications. E.g., Office 365

**Is current infrastructure capable of supporting modernization effort?** - Most all modernization depends on Cloud platforms

- ▶ Current internet speeds don't adequately support Cloud applications
- ▶ Options such as satellite internet offer possible solutions

# Next steps

- ▶ Incorporate feedback into the final current state assessment deliverable, as necessary
- ▶ Identify and evaluate options, considering benefits, effort, timelines and cost estimates
- ▶ Define a set of initiatives and prioritize based on quick wins vs. strategic
- ▶ Develop a high-level roadmap and tactical next steps
- ▶ Present findings







# THANK YOU

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# APPENDIX

# Workshops / sessions conducted

Workshop Focus	Attendees	Location	Date
1 Technology	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Dean Leesui</li> <li>○ Olya Bogoyevic</li> </ul> </li> <li>• ToB               <ul style="list-style-type: none"> <li>○ Peter Johnston</li> <li>○ Andree Gagne</li> </ul> </li> </ul>	Remote	August 24, 2021
2 Admin and HR	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Dean Leesui</li> <li>○ Olya Bogojevic</li> </ul> </li> <li>• ToB               <ul style="list-style-type: none"> <li>○ Peter Johnston</li> </ul> </li> </ul>	Remote	August 25, 2021
3 Finance (budgeting)	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Dean Leesui</li> <li>○ Olya Bogojevic</li> </ul> </li> <li>• ToB               <ul style="list-style-type: none"> <li>○ Doug Laplante</li> </ul> </li> </ul>	Remote	August 25, 2021
4 Leadership discussion	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Dean Leesui</li> <li>○ Olya Bogojevic</li> </ul> </li> <li>• ToB               <ul style="list-style-type: none"> <li>○ Doug Laplante</li> <li>○ Peter Johnston</li> <li>○ Andree Gagne</li> <li>○ Ann Carr</li> </ul> </li> </ul>	Remote	August 26, 2021
5 Operations	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Dean Leesui</li> <li>○ Olya Bogojevic</li> </ul> </li> <li>• ToB               <ul style="list-style-type: none"> <li>○ Peter Johnston</li> </ul> </li> </ul>	Remote	August 26, 2021

Workshop Focus	Attendees	Location	Date
6 Project Management	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Olya Bogoyevic</li> </ul> </li> <li>• ToB               <ul style="list-style-type: none"> <li>○ Hassan Rouhani</li> </ul> </li> </ul>	Remote	August 24, 2021
7 Digital blueprint	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Olya Bogojevic</li> </ul> </li> <li>• Digital blueprint               <ul style="list-style-type: none"> <li>○ Mark Cotnam</li> <li>○ Jeff Godfrey</li> </ul> </li> </ul>	Remote	September 9, 2021
8 Public Works Manager	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Bill Suri</li> <li>○ Olya Bogojevic</li> </ul> </li> <li>• ToB               <ul style="list-style-type: none"> <li>○ Ann Carr</li> </ul> </li> </ul>	Remote	September 13, 2021
9 Finance	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Bill Suri</li> <li>○ Olya Bogojevic</li> </ul> </li> <li>• ToB               <ul style="list-style-type: none"> <li>○ Andree Gagne</li> </ul> </li> </ul>	Remote	September 16, 2021
10 Edicord	<ul style="list-style-type: none"> <li>• BDO               <ul style="list-style-type: none"> <li>○ Dean Leesui</li> <li>○ Bill Suri</li> <li>○ Olya Bogojevic</li> </ul> </li> <li>• Edicord               <ul style="list-style-type: none"> <li>○ Phil Wolf</li> <li>○ Clint</li> </ul> </li> </ul>	Remote	September 17, 2021