



BPO & ECM Review

Council Update
2021-02-22

**Perry Group
Consulting^{Ltd.}**

About Us

Focused on municipalities – 120 municipal clients across Canada

Development of IT, GIS and Digital strategic plans, service reviews and business process optimization

Our consultants have worked in and with many municipalities

- Aurora, Caledon, Halton Hills, Innisfil,
- Newmarket, Peterborough, Guelph, Waterloo, Cambridge, Regina, Burlington, Oakville, Kitchener, Vaughan
- Region of Waterloo, York Region, Brampton

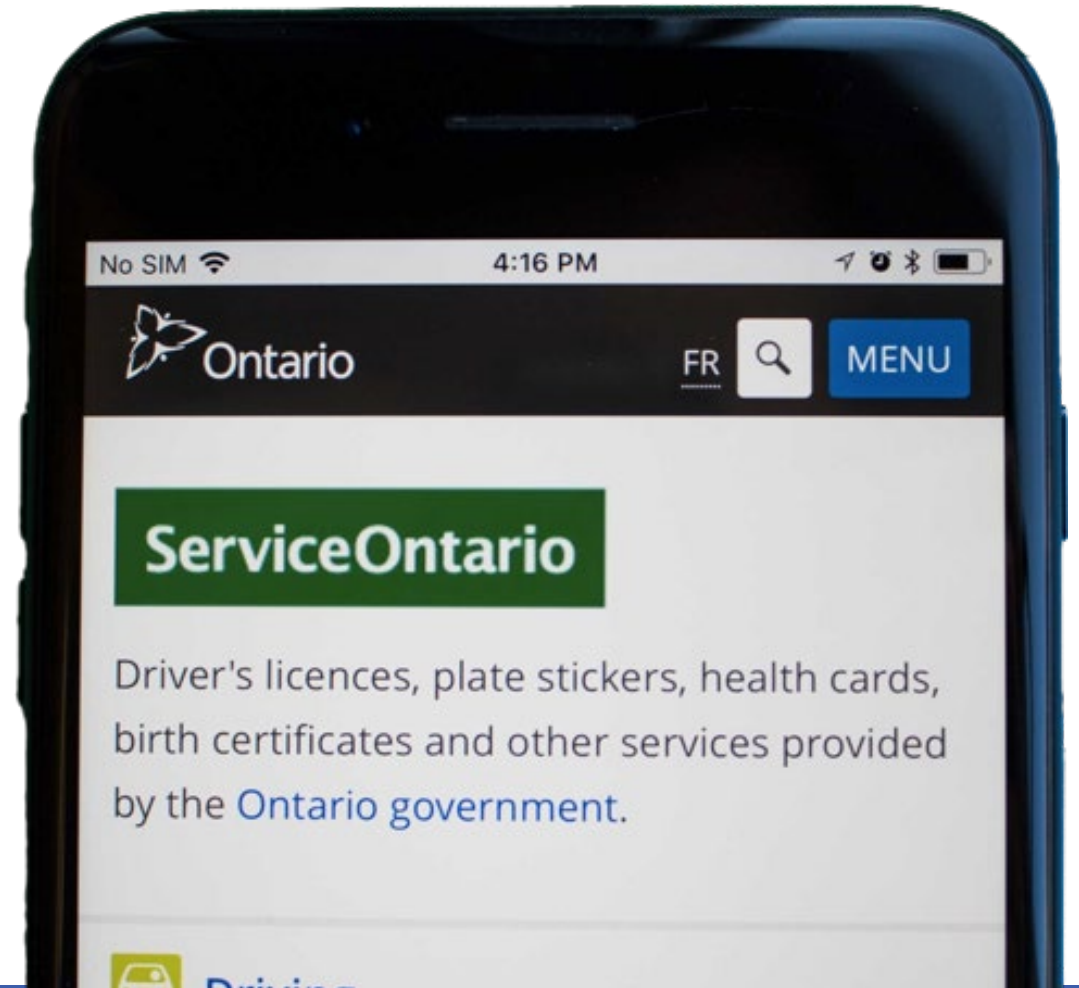
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The Project

- City applied and received a Municipal Modernization Program grant from Province
- 2 workstreams
 1. Conduct Business Process Optimization (BPO) reviews
 2. Review Enterprise Content Management (ECM) – Document and Records practices, processes and technology, and determine whether Microsoft 365 could meet the City's current and future needs

Technology as a Foundation

- In 2021 we are firmly in the internet and smartphone era
- Customer expectations have changed
- Ability to leverage technology should be a core competency of a modern and effective municipality



BPO Review

Select processes – City identified 28 processes;

For each process:

1. Workshop with staff to review current processes (As-Is) and identify improvement opportunities
2. Workshop with staff to design an optimized process, incorporating improvements (To-Be)
3. Consulting team document, quantify improvements, how to achieve them, review and validate with City staff

1.	Animal Licensing – External	16.	Municipal Lot Parking Permits
2.	Animal Licensing – Internal	17.	Municipal Lot Complaints
3.	Asset Condition Assessment	18.	Parking Enforcement – Complaints and Ticket Lifecycle Management
4.	Asset Management Complaints and Service Request Management	19.	Property Standards Bylaw Complaints – Building
5.	Asset Replacement	20.	Road Occupancy Permits
6.	Building Permits – New Construction	21.	Site Plan Applications Process
7.	Building Permits – Renovations	22.	Tax Certificate Request Management
8.	Clean and Clear Bylaw Complaints	23.	Vital Statistics – Burial Permits
9.	Compliance Letters – Building and Zoning	24.	Vital Statistics – Marriage Licenses
10.	Compliance Letters – Multi-Unit	25.	Water and Wastewater Quality Management System – Document Change Request (DCR)
11.	Council Meeting, Agenda Management	26.	Water and Wastewater Treatment Quality Management System – Opportunities for Improvement (OFI)
12.	Entrance Permits	27.	Water and Wastewater Treatment Work Orders
13.	Fire Document Review	28.	Water and WW Treatment Logbooks
14.	Fire Inspections		
15.	Locates Request Management (Water, Electrical)		

BPO Opportunities

- **Opportunities for online customer self-service**
 - Most customer facing services are designed for over-the-counter service delivery.
 - Customers must visit a City office to make payments and/or produce forms with original signatures
- **Opportunities for streamlining and automating back-office processes**
 - Business processes are largely paper based
 - Dependency on administrative support
 - Data is entered in systems to track the activities after the fact - systems don't support automation
 - Duplication of information is common
- **Opportunities for connecting field staff to back-office systems**
 - Field staff typically write information on paper that is later transferred into systems by administrative staff

Prime Candidates

- | | |
|--|--|
| • Utility Locate Requests | • Requests |
| • Building Permit – New Construction and Renovations | • Tax Certificate Request Management |
| • Road Occupancy Permits | • Water and WW Treatment Work Orders |
| • Asset Related Complaints and Service | • Asset Condition Assessment and Replacement |

9,750 hours potential time savings ~ 6,000 fewer customer trips to City Hall, 60,000 fewer documents produced

ECM: SIRE → Office365

- Our review confirmed that SIRE (2007) must be replaced
- Consultants led an ECM requirement gathering process with City staff, Clerks, and IT
- Fit-gap assessment identified that Microsoft 365 – product currently used by City for collaboration – can meet City’s requirements
- New ECM would bring significant collaboration efficiencies
- Work on document and records management policy and practices is required before ECM implementation
- **Caution:** Challenging project to do successfully – requires leadership support, resource investment and commitment

Quick Wins

- New online forms, using the eForms builder solution, including training business unit staff to use the tools.
- Interim technology to field-staff using eForms and GIS solutions to collect data in the field.
- Central Square Virtual City Hall (VCH) Dog licensing and Tax Certificates solutions.
- Expand Citywide Asset Management solution to support immediate work tracking, logbook and other needs.
- Web Portal to simplify customer experience and offer new digital services.

Strategic Initiatives

1. Expansion of the Citywide Asset Management system currently being implemented to address corporate Work Management needs;
2. Microsoft 365 expansion for ECM;
3. Implementation of a Planning, Permitting and Licensing System (PPLS);

Summary

- Many opportunities on the table to modernize
- To be most impactful, focus on a handful of significant strategic initiatives
- Ensuring success will require investment in systems and staffing to deliver initiatives successfully



Thank You

Questions?

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