



The Corporation of the Town of Tecumseh

Technology & Client Services

To: Mayor and Members of Council

From: Shaun Fuerth, Director Technology & Client Services

Date to Council: Tuesday, June 24, 2025

Report Number: TCS-2025-04

Subject: IT Service Delivery Review and Organizational Review Report Out

Recommendations

It is recommended:

That Report TCS-2025-04 entitled “IT Service Delivery Review and Organizational Review Report Out” **be received**.

Executive Summary

Since 2021 there have been several reviews conducted with respect to the Technology & Client Services department including:

- Information Technology Service Delivery Review (2021)
- Organizational Review / Customer Service Study (2021)
- Digital Strategy (2022)
- Business Continuity & Disaster Recovery Plan (2022)
- Cloud Strategy (2025)

This report details progress made to date in the above noted studies.

Background

In 2021, an Organizational Review (Org. Review) was conducted by KPMG Consulting and also an Information Technology Service Delivery Review (ITSDR) by Perry Group Consulting (PGC). Both reviews contained numerous recommendations as related to Information Technology, Customer Service and Communications. At a Special Council Meeting on June 29, 2021, Council received a [report](#) presented by [Perry Group Consulting](#) providing details of the ITSDR. At the same meeting a report was received around the Organizational Review that included centralizing Customer Service and Communications under a newly formed department – “Technology & Client Services”. The ITSDR highlighted gaps in the Town’s Technology & Client Services (TCS) Department and made recommendations that included enhancements to staffing capacity, realignment of duties in addition to service, policy and process improvements. The KPMG Org. Review recommended additional resources to the IT Group and centralized Customer Service and Communications. The reviews were undertaken with full staff participation and the resulting recommendations continue to be supported by the Senior Management Team (SMT) and CUPE leadership. At the time, Administration recommended a phased approach to the changes in business structure and focus found in both the ITSDR and the Town’s Organizational Review.

Comments

Information Technology Update

In 2021, as part of the ITSDR current state assessment, PGC reviewed information gathered from all departments, members of Council and IT staff to develop a strategy and work plan for implementation in a phased approach 2021-2025.

Overall recommendations were categorized as follows:

1. Governance
2. Infrastructure
3. Business Solutions
4. Data and Integrations
5. Customer Facing
6. IT Supported Initiatives

1. GOVERNANCE

IT Governance

Recommendation: Perry Group discovered that there was a lack of IT Governance in the organization. IT Governance is intended to aid the organization in aligning IT and digital activities with business and corporate strategy. It is about creating value

by actively engaging the business to participate in IT decisions that impact the organization. The governance model should reinforce principles of collaboration, openness and transparency and collective decision-making by establishing a structure that oversees IT investment, business application needs, IT architecture and infrastructure technology decisions.

Status: An IT Governance Framework was presented to the Senior Management Team (SMT) in 2021 and resulted in the creation of an IT Governance Committee for the Town with membership from each department and the CAO.

As recommended, this committee now meets biannually to review budget, project intake, key performance indicators / metrics, business solutions, cybersecurity, policy development, and advise on any challenges related to Information Technology.

Digital Strategy

Recommendation: The ITSDR recommended the creation of a Digital Strategy that would assist the Town in identifying digital transformation opportunities with a “customer first” focus.

Status: This strategy was carried out in February 2022 by PGC and highlighted the need for implementation of online initiatives such as eCommerce, Open Data, permitting, accessibility and customer service request management.

A Digital Engagement and Communication Strategy has not been formally adopted although a Communication Policy has been endorsed by Council.

As part of this strategy, the key opportunities identified included: Business Service Optimization with end-to-end digitization of services, implementation of a municipal Enterprise Resource Planning (ERP), create a customer portal, decision on Customer Relationship Management (CRM), digital form transformation, online building/planning permits, staff collaboration tools, selection of digital channels, and create an online payment portal.

Within the Digital Strategy there were two business optimization reviews that included Building Permit and Inspection Services and Pet Licensing and Renewal Service. By streamlining these two services and providing a beginning to end, user friendly digital solution both applicants and staff benefit from efficiencies in the process.

Administration is continuing to utilize the current ERP financial system but are in the process of migrating the payroll and human resource application to a new Human Resource Information System (HRIS) to be completed by the end of 2025.

Improvements have been made to the online 'report and issue' portal with more information provided to the client for tracking purposes. Reports on this system are now presented to Council annually.

New technology introduced in 2022 now enables staff to collaborate on projects more efficiently digitally.

A centralized and integrated online payment portal is still being evaluated for deployment in 2026.

Cloud Strategy

Recommendation: Developing a Cloud Strategy will govern the use and appropriateness of Cloud services. Cloud technologies are becoming more prevalent in IT both to support back-end infrastructure and to provide business and customer-facing solutions. For all the advantages Cloud can bring, making informed decisions and having appropriate policy in place is important to avoid potential risks, shortfalls and cost implications that can be associated with Cloud. The organization is already using some Cloud technologies (such as ActiveNet and eSolutions as Content Management Systems) and many of the projects on the roadmap may use Cloud for future solutions.

Status: A Cloud Strategy and Roadmap was developed in 2025 by PGC and presented to Council at a Special Council meeting held February 11, 2025. A Cloud Maturity Assessment was used to evaluate how the Town utilizes Cloud Computing relative to servers, storage, software, analytics, and intelligence over the Internet ("the cloud"). Administration is currently reviewing the recommendations from this study which includes several initiatives including a formalized assessment tool when evaluating Cloud vendors, formalizing cloud-based skills for staff, cloud governance as part of IT Governance, and improved Information Lifecycle Management and Data security. Administration will be bringing several policies to Council for approval this fall and a report out on the Cloud Strategy in 2026.

Enterprise Content Management (ECM) / Corporate Document Management (CDM) Strategy

Recommendation: Effective ECM and CDM strategies outline how to organize, manage, store and deliver content and documents and defines how content is capture, organized, accessed, and secured ensuring ease of access to authorized individuals.

Status: Administration is working with several vendors and have onboarded a Records Management Specialist to oversee methods by which records are stored in conformance to the Town's Records Retention By-law. A record storage structure is currently being adopted.

2. INFRASTRUCTURE PROJECTS

Recommendation: Infrastructure projects are the foundational layer to providing IT services in the organization. They include the networks, devices, security and backups to keep the IT systems running and accessible.

Status: One key project under this recommendation was the development of a Business Continuity / Disaster Recovery Plan (BCDRP). This plan was created by staff and adopted in April 2022. This plan is currently maintained by the respective business units in preparation for any unplanned disruption in service. A status summary of all current and planned Infrastructure Projects highlighted in the 2021 ITSDR can be found in Appendix I.

3. BUSINESS SYSTEM PROJECTS

Recommendation: Business Systems are the solutions that support the organization to complete day-to-day activities.

Status: A number of Business System initiatives were identified in the review and included recreation software upgrades with online registration, work order management, Council chamber automation and an online mapping portal.

A Town intranet was launched in September 2023 with information on staff events, policies and educational material.

One key deficiency from the ITSDR was that the Town had no formal IT Service Management solution in place. Requests to the IT department were mostly verbal or by email. In 2022 an IT ticket request system was introduced to the organization and in January 2024 a full time Help Desk Technician was hired to assist with triaging requests resulting in more expedient response times.

During the assessment, Town staff voiced concern over lack of IT training across the organization. TCS now offers training opportunities both online and in-person on a regular basis to provide staff learning opportunities.

A summary of all current and planned Business System Projects highlighted in the 2021 ITSDR can be found in Appendix I.

4. DATA AND INTEGRATIONS

Recommendation: Data integrations determine how the information in the organization is exchanged and maintained. Data is an asset of the organization and must be treated accordingly.

Status: Examples of Data and Integrations include Flood Plan Updates, NG-911 mapping, Municipal Easement Mapping and Asset Management Plan Support.

There were several current and planned Data and Integration projects were highlighted in the 2021 ITSDR. The status of each project can be found in Appendix I.

5. CUSTOMER-FACING PROJECTS

Recommendation: Customer-Facing projects deliver services to the public, usually through online and self-service channels.

Status: Several current and planned Customer-Facing projects were highlighted in the 2021 ITSDR. The following have been implemented: eForms Rollout, Council agenda webcasting and close captioning, on-demand transit and a website refresh in 2024.

6. INFORMATION TECHNOLOGY SUPPORTED INITIATIVES

Recommendation: TCS is also engaged in projects beyond the normal scope of IT and in support of corporate initiatives.

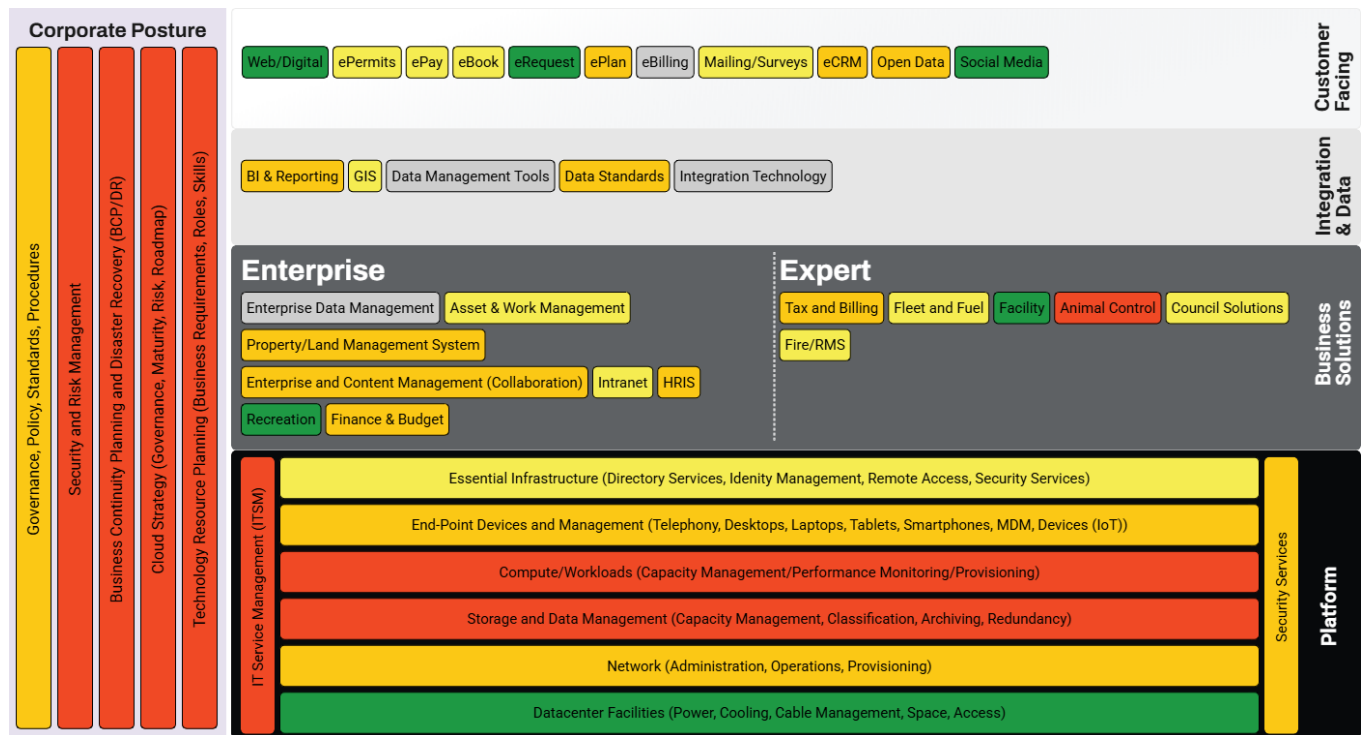
Status: The department has provided support to several projects not necessarily part of traditional IT such as: AODA Compliance, Citizen Satisfaction Survey, Parks Master Plan support, Town Hall Expansion, Arena Renovation, and Lakewood Park upgrades.

MUNICIPAL TECHNOLOGY MODEL

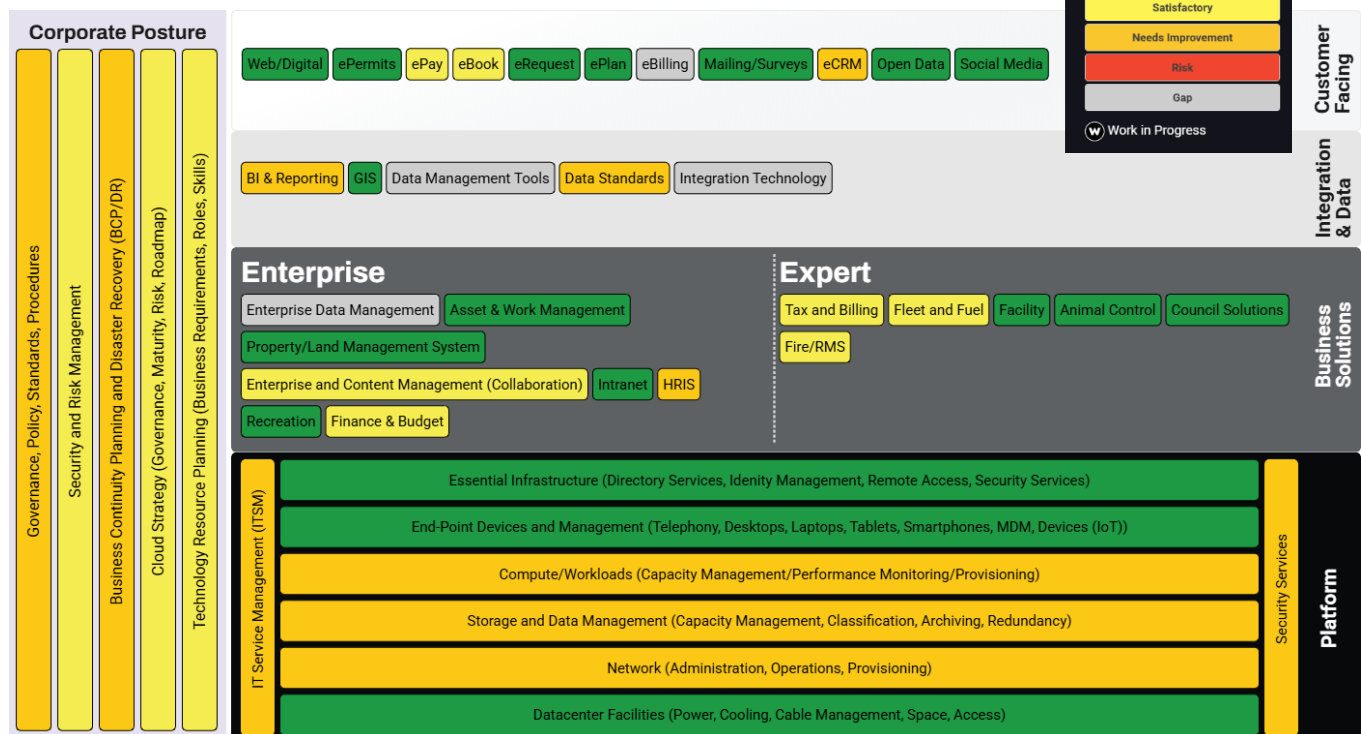
As part of the 2021 ITSDR, a Municipal Technology Model (MTM) was created which identifies the technologies that a fully mature municipality would be expected to have in place and provides a framework for the consulting team to assess a municipality's technology environment.

This municipal IT model was developed with Ontario municipalities over the last 15 years. The MTM introduces several key concepts that are important for the Town at this time. The following images depict progress made in several areas from 2021-2025.

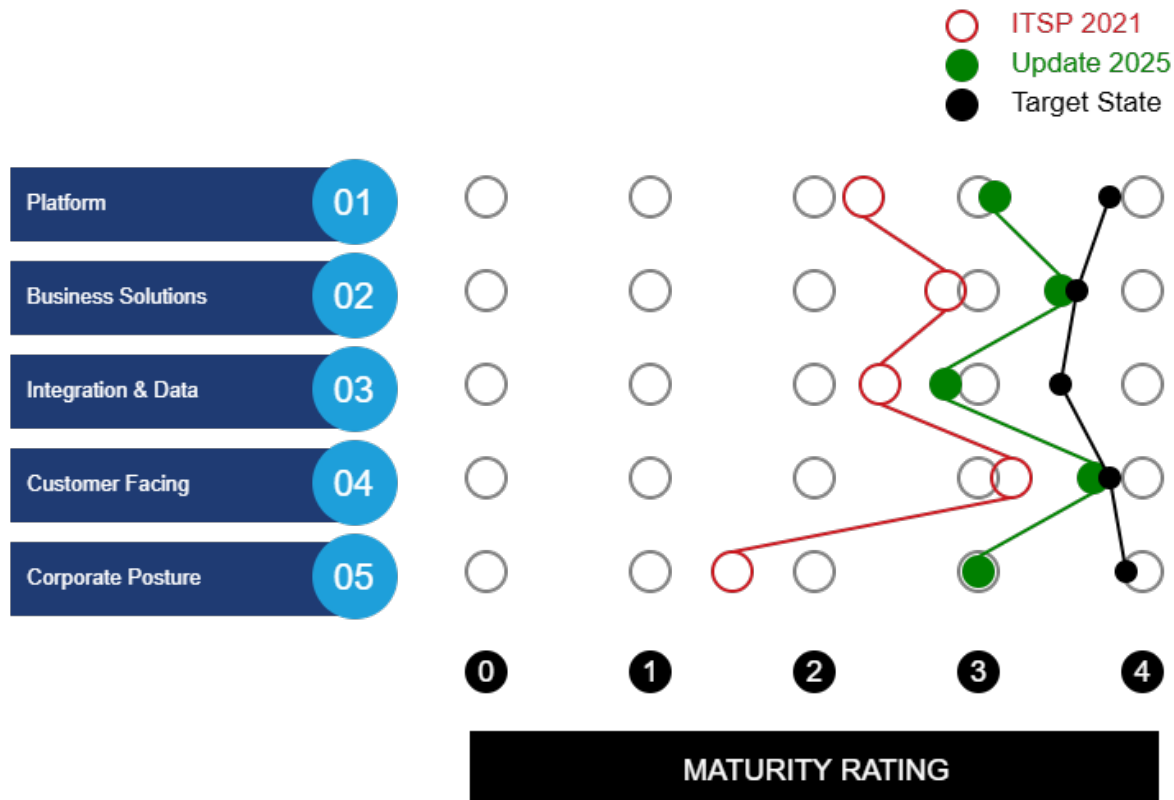
Municipal Technology Model – 2021



Municipal Technology Model – 2025



IT Service Review Maturity 2021-2025



IT ORGANIZATION

Recommendation: PGC compared staffing with other municipalities of the same size and also provided a detailed comparison relative to IT budget and responsibilities. It was found that the department was too lean which aligned with the recommendation from the KPMG Org. Review. It was recommended that the department which originally consisted of an IT Director, Systems Analyst and two GIS Technicians would be augmented with the creation of an IT Manager, a Helpdesk Technician and a Business Analyst. (see Figure 1) The creation of a GIS Strategy and Roadmap was also recommended.

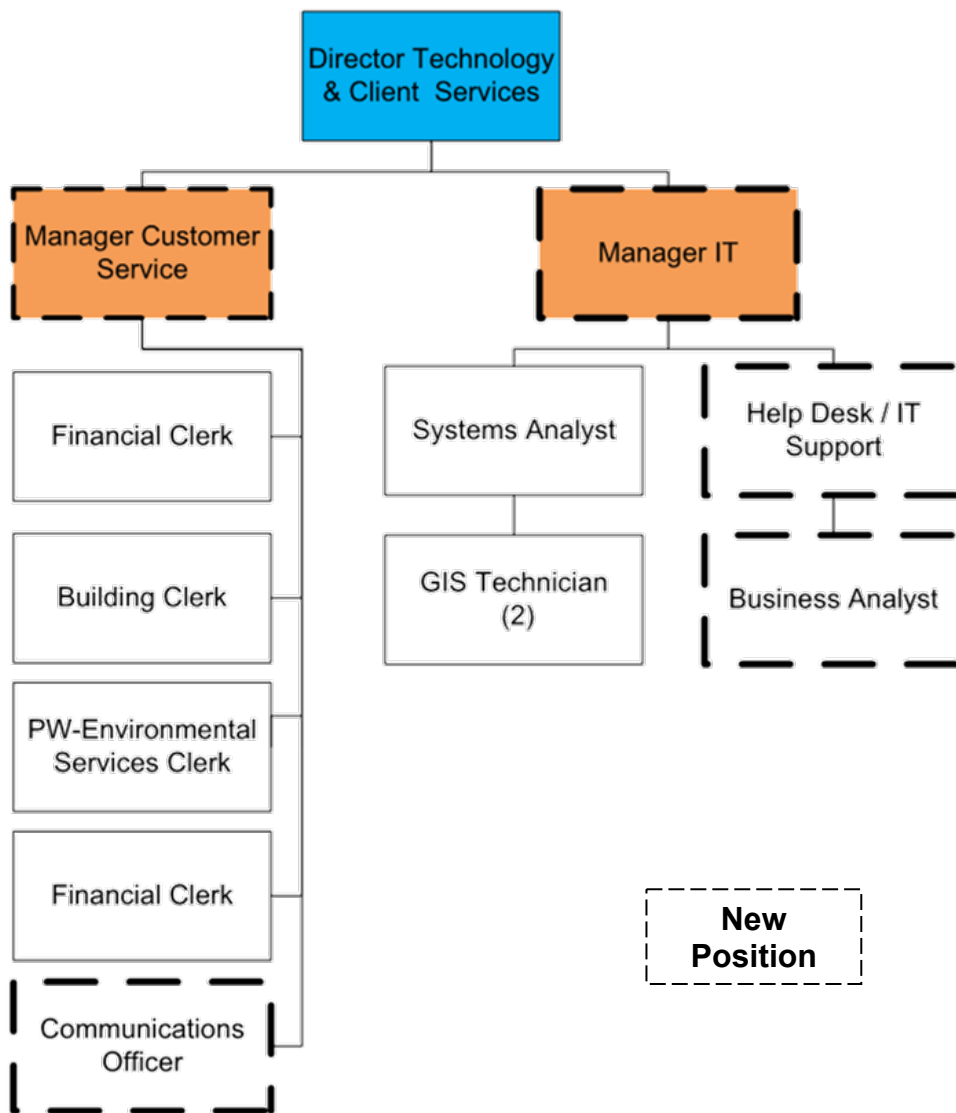


Figure 1

Status:

The **Manager IT** was hired in December 2022 and has greatly assisted in overseeing day to day operations of the IT group with supervision of support staff, policy implementation, technical documentation, end-user training, secure backup/retention, network and cybersecurity monitoring/hardening/improvements and vendor management. As predicted in the ITSDR and Org Reviews, this has allowed the Director to proceed with the invocation and implementation of several key initiatives including formalizing an IT Governance Structure, a Digital Strategy, a Business Continuity / Disaster Recovery Plan, a Cloud Strategy, Policy development and participation in other Senior Management initiatives.

A **Help Desk Technician** was hired in January 2024 and has been instrumental in assisting in resolving day to day technical issues in a timely and efficient manner for our end-users. In 2024, there were over 2,500 IT Helpdesk tickets submitted of which the Help Desk Technician resolved 1,267. This role has also been beneficial in creating and monitoring cybersecurity initiatives (ex. phishing campaigns) and providing reporting for same.

A **Business Analyst** was proposed to be hired in October 2024 which was deferred until October 2025 during the 2025 budget deliberation. A Municipal Business Analyst focused on innovation examines municipal operations, identifies opportunities for improvement, and proposes creative solutions to enhance efficiency and service delivery. This role often involves process analysis, re-engineering, and stakeholder engagement. Once analysis is complete, this position will also evaluate and prioritize projects through IT Governance as key tasks will be developed, implemented and monitored by the Business Analyst.

Geographic Information System (GIS)

Status: The Town currently uses the ESRI ArcGIS platform to deliver GIS products and services. The current structure has two GIS Technicians as part of the TCS Department. GIS provides a critical service of data management of all spatial and property-related data in addition to mapping functions to all departments, consultants and the public. There are many examples of the usefulness of GIS at the Town (e.g., web mapping, collector field app, open data portal, data analysis, cartography etc.).

Next Steps: As a future consideration, to maximize the potential GIS can offer the Town, a coordinated and strategic GIS Roadmap should be developed that will provide the key to leveraging GIS more effectively and expanding the Town's data focus. A GIS Strategy & Roadmap could also identify products or services that can be leveraged by multiple areas within the Town and determine which have the greatest impact to customers and community partners.

The GIS Strategy & Roadmap will be developed in consultation with the IT Governance Committee so decisions can be made to ensure funding is approved for work that will have the highest impact and meet corporate strategic goals. Active leadership over GIS (and data) is necessary to coordinate resources. Proposals are currently being evaluated, and the GIS Strategy/Roadmap will be completed this fall 2025.

Customer Service / Communications Update

Customer Service

The KPMG Org. Review contained numerous findings related to Customer Service including:

- An inconsistent level of training in customer service across the organization.
- Customer service representatives report to specific departmental managers and there is no formal cross training between municipal service areas.
- Performance management appraisals do not contain accountability for the delivery of excellent customer service.

Based on the interviews and resulting findings, the following opportunities were recommended for implementation:

- Create a Manager of Customer Service position with staff responsibility for all customer service representatives within the organization. This position should report to a Director and be accountable for customer service delivery throughout the organization (see figure 1).
- Establish a formalized training program for customer service representatives that includes customer service training, cross training on departmental programs and services, the municipality's website and the use of the Cityworks software. Reporting to be defined under the Manager Customer Service with dotted line relationships to home department.
- Establish accountability criteria for the delivery of excellent customer service on performance

Status: A Manager Customer Service was hired in 2023, bringing municipal experience in providing excellent customer service combined with public communication skills. The Manager has developed and begun to implement a Customer Service Strategy that includes formalized training for staff around cross training, consistent approaches to various aspects of Customer Service (ex. De-escalation training), use of a knowledgebase and service request management. As recommended, regular reporting to Senior Management and Council related to Customer Service key performance indicators continues on a regular basis. The notion of Customer Service excellence has also been introduced in the culture of the organization including being embedded as one of the three pillars of the Town's Strategic Priorities.

Next Steps: The Manager Customer Service will continue to create a culture of customer service excellence through robust communication and training initiatives. Using data analytics, the Manager will identify issues and gaps related to customer-centric service delivery and experience. In 2025, Customer Service initiatives will be

expanded to departments outside of Town Hall. (i.e., Community & Recreation Services, Community Safety).

Customer Experience Maturity

The organizational review conducted in 2021 by KPMG included a customer experience maturity model where Tools and Technology was identified as a category within the Customer Experience maturity assessment. This category covers systems and technology that the organization deploys to support the design, delivery and continuous improvement of superior customer experience. Closely related to Tools and Technology is the Channels category that was also identified as part of the customer experience maturity model which includes providing seamless multi and omni channel customer experiences that increase value and provide effective connections to Town services. Below is a summary of actions that have been taken in response to recommendations within the 2021 Organizational Review- Customer Service Report specifically for the Tools and Technology and Channels categories:

Identified Opportunity	Status
Implement Cityworks in the departments not currently using it.	Since 2021, departments have gradually been onboarded to using Cityworks and required workflows identified. For some departments and roles, the function is strictly to enter service requests while others rely on the system for workflow management. As part of Cityworks cloud migration throughout the summer of 2025, Water Services will be onboarded into Cityworks and an audit will be completed of all service request categories to ensure they are current and reflective of the needs from each department.

Identified Opportunity	Status
<p>Implement a formalized training program for staff in the effective use of Cityworks software.</p>	<p>In spring 2023 Cityworks training was provided for Town staff and associated reference material provided. A dedicated section on the intranet was also established to house Cityworks training and reference material. Refresher sessions were provided in spring 2024. One on one training sessions are available for new employees who require direct use and access to Cityworks as part of their role. The Manager Customer Service is responsible for ensuring newly onboarded Customer Service Representative positions receive Cityworks training.</p>
<p>Implement appropriate technology to track customer interactions for various channels such as telephone, website, email. etc.</p>	<p>While the Town does not have a formal Customer Relationship Management (CRM) platform, customer interactions can be tracked to varying degrees across the current service channels. This includes:</p> <ul style="list-style-type: none">• Telephone live answer ("0" option queue line) monitoring and reporting (wait times, answer rates, dropped calls)• Website analytics (views and page specific engagement metrics)• Form submissions through the website with a priority to minimize the use of fillable PDF forms and instead use the built-in form builder on the website platform• Social media metrics and analytics that capture engagement, reach and themes <p>The Manager Customer Service continues to actively review CRM options and assess the needs of the Town.</p>

Identified Opportunity	Status
<p>Review the areas/functions within the organization that have manual processes and establish a technology strategy that addresses the manual processes within the organization and prioritizes automating the associated functions.</p>	<p>A number of manual or multi system/step functions have been updated since the review was completed in 2021. These include:</p> <ul style="list-style-type: none">• Docupet (dog license registration)• Flowpoint (bulk water transactions)• Cloud Permit (building permit applications)• Website payments via forms• Report an Issue web portal
<p>Establish a new telephone line for customer inquiries/concerns that is live answered by customer service representatives and has telephony statistical reporting.</p>	<p>As part of updating the phone system in fall of 2023, a queue line was implemented to offer a live answer option ("0") from the main menu at Town Hall. The primary queue (Tier 1) is comprised of five CSRs from Financial Services, Legislative and Clerk Services, Public Works & Engineering Services and Development Services. The secondary queue (Tier 2) includes designated back-up roles for each department in the primary queue. Reporting features include queue overall performance (answer %, wait time, when calls moved to tier 2) as well as agent specific metrics that are reviewed by the Manager, Customer Service.</p>
<p>Implement a marketing campaign to promote the new telephone line</p>	<p>Dedicated phone line was not implemented as a queue line was established on the main phone menu, therefore specific marketing campaign was determined to be not required.</p>

Identified Opportunity	Status
<p>Maintain existing “main line” for pre-established communication between staff and customers,</p>	<p>The main Town phone line was maintained as part of updating the phone system to 3CX (a cloud based platform). Existing extensions were maintained and phone tree options were re-organized based on volume. The Manager Customer Service will continue to monitor main menu voice prompts, volume and metrics to ensure customers experience seamless connections to intended departments.</p>
<p>Review website forms for consistency. For example, some accept online payments while others do not. Some require printing and physical signature and some are fillable forms. Some can be submitted electronically, while others cannot.</p>	<p>Since 2021 there has been a concerted effort to create website-based forms that enable information to be stored and exported from one place as we as a seamless submission process for customers. For existing fillable PDF forms, when updates are required, the priority has been to re-create the form as web based. A website refresh was deployed in fall 2024, which has provided an opportunity to review existing forms and determine guidelines that should be included as part of website governance and best practices.</p> <p>With the implementation of platforms such as Docupet, FlowPoint and Cloud Permit, previous processes that would have included a workflow and signature process for forms, is now automated from input to payment transaction for the customer with electronic consent in place of physical signature and in person payments.</p>

Communications

The KPMG Org. Review contained the following observations relative to Communications:

Prior to the Org. Review the responsibility of Communications was decentralized and carried out by committee between the CAO's office, IT and the Clerk's Office. As a result of the discovery process, KPMG observed that:

- The Town's Customer, Communication & Information Services department does not have dedicated staff to support the Town's communication services.

The resulting recommendation was that:

- The Town should create a Communications Officer position. The position would be responsible for all internal and external communications for the Town.

Status: In 2023 a Communications Officer was hired who reports directly to the Manager Customer Service. The Communications Officer is responsible for communication of information to Council, administration, Town Staff and the public. Other duties include assisting in corporate communication and marketing plans, corporate branding, media releases, briefings, public engagement, website administration and managing the Town's social media platforms. Since this position was created, we have been fortunate to provide support this position with summer co-op students. Through promoting awareness throughout the organization, including council, the centralization of communications into this division has provided consistency in the delivery of communications both internally and externally.

Next steps: Continue to provide guidance to Council and staff regarding communication protocols. This includes creating messaging, working with departments on communication strategies and being the main point of contact for media inquiries. It is important that communication tools and strategies remain current in order to maximize engagement and interest. With recent success in utilizing video content to gain enhanced reach and engagement, the Communications team is exploring options to expand use of videography to promote the Town as a place to live work and play.

Summary

Administration will continue to implement the recommendations arising from the Information Technology Service Delivery Review and the Organizational Review through a phased approach. Oversight of these initiatives will be provided by the Information Technology Governance Committee, which will regularly assess progress to ensure that all actions undertaken are consistent with the Town's overarching goals for operational efficiency, service excellence, and organizational sustainability. Areas such as Artificial Intelligence and Cybersecurity have both

garnered increased attention in recent years and will be closely monitored by TCS and the IT Governance Committee. Administration will provide Council with regular progress reports outlining key accomplishments, identified challenges, and forthcoming actions. These updates will facilitate informed decision-making and ensure continued alignment with Council's strategic objectives.

Consultations

All Departments

IT Governance Committee

Financial Implications

None

Link to Strategic Priorities

Applicable	2023-2026 Strategic Priorities
<input type="checkbox"/>	Sustainable Growth: Achieve prosperity and a livable community through sustainable growth.
<input type="checkbox"/>	Community Health and Inclusion: Integrate community health and inclusion into our places and spaces and everything we do.
<input checked="" type="checkbox"/>	Service Experience: Enhance the experience of Team Tecumseh and our citizens through responsive and respectful service.

Communications

Not applicable ☒

Website ☐

Social Media ☐

News Release ☐

Local Newspaper ☐

This report has been reviewed by Senior Administration as indicated below and recommended for submission by the Chief Administrative Officer.

Prepared by:

Shaun Fuerth, BCS
Director Technology & Client Services

Recommended by:

Shaun Fuerth, BCS
Director Technology & Client Services and Acting Chief Administrative Officer

Attachment Number	Attachment Name
1.	Appendix I