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YORK REGION INFORMATION TECHNOLOGY STRATEGY (YRITS)

The e-Government Sub-Committee recommends the following:

- 1. The presentation made by Louis Shallal, Director of Information Technology, regarding the Regional Municipality of York Information Technology Strategy be received; and**
- 2. The recommendations contained in the following report, March 7, 2005, from the Commissioner of Finance, be adopted:**

1. RECOMMENDATIONS

It is recommended that:

1. The Information Technology Strategy & 5-Year Plan be approved, subject to annual budget approvals.
2. That staff be directed to report to the e-Government Sub-Committee annually on recommended amendments that result from the annual review and update of the IT Strategy.

2. PURPOSE

This report provides the e-Government Sub-Committee with an overview of the York Region Information Technology Strategy (YRITS) and 5-Year Plan. A copy of the full document accompanies this report.

The IT Strategy highlights the approach and process for allocating the Region's limited information technology resources to a large number of IT projects to support the various departments of the Region. The YRITS was developed with input from members of the e-Government Sub-Committee, the Corporate Technology Review Committee (CTRC), staff and management of the Region and other key stakeholders.

3. BACKGROUND

During the fall 2004, the Information Technology Services Branch sponsored a number of collaborative workshops involving CTRC members, e-Government Sub-Committee members and other management, staff and guests for the development of a York Region Information Technology Strategy

An external facilitator, experienced with these types of workshops and strategy development was retained to navigate the process and ensure active involvement of all participants. The starting point in the development of the IT Strategy was a

comprehensive review of the existing guiding documents, particularly Vision 2026. Vision 2026 provided the foundation for the YRITS document and each of the information technology initiatives, programs, projects and services was linked to the eight Vision 2026 goals. The linkages ensure that the IT Strategy is aligned with the long-term goals and values of the regional community as identified in the Vision 2026 document.

The second guiding document that provided direction in the formation of the IT Strategy was the Customer Service Strategy. The essence of the Customer Service Strategy is reflected in one of the Key Strategic Outcomes, namely: “Deliver Effective Customer Service” noted later in this report.

The other guiding documents used in the strategy development were the various business plans of the Regional departments. The IT Strategy and 5-Year Plan document represents a synthesis of cross-departmental input guided by the goals and values of Vision 2026 and the Customer Service Strategy and departmental business plans. The IT Strategy advocates that decisions on investments in information technology are based on sound business cases that identify the costs and benefits associated with individual projects as well as alignment of these IT projects with the services delivered by the business units of the Region. Using this framework, emerging opportunities such as the OneYork initiative can easily be integrated into the Region’s 5-Year Plan for information technology projects.

3.1 Basis for the IT Strategy

The purpose of the Information Technology Strategy is to chart a roadmap to the future for the effective deployment of Information Technology in York Region. The IT Strategy is about making choices. Associated with these choices are corresponding costs and benefits. The IT Strategy is about making strategic investment decisions in IT within the constraints of the fiscal realities of the Region. The IT Strategy is also about leveraging the resources of the organization to accomplish the programs and projects identified in the five year work plan resulting from the Strategy.

Information technology is an enabling tool that supports Regional business functions and activities. The adoption and use of information technology is wide-spread throughout the Corporation and many of the mission critical applications in the Region are dependent on the availability of key information technology, such as the voice and data networks, on a 7 day by 24 hour (7/24) basis.

The Information Technology Services (ITS) Branch provides and supports a wide variety of technology services and solutions for the Region. Services include the provision of telephones and voice mail systems, service desk (help desk) support, project management for technology solutions, computer networks for local and remote clients, desk top PC refresh, software application development and management of enterprise resource programs such as PeopleSoft and document management systems. Information technology has become fully integrated into the Region’s day-to-day business processes. Because of competing requests for projects to access information technology

infrastructure and resources, the ITS Branch initiated the York Region Information Technology Strategy to prioritize among the needs.

Furthermore, as information technology and Region business operations become more interdependent, there is a growing need to optimize IT investment across the organization to avoid redundancies and waste. The key to aligning IT with departmental and corporate goals is to include IT in the business planning process early and at the highest levels and to encourage joint IT – business governance to measure trade offs, to spot redundancies, to identify opportunities and to set priorities using an IT and business capabilities road map. The IT Strategy provides such a road map and the existing CTRC (Corporate Technology Review Committee) is the appropriate group to foster this alignment and to demonstrate that IT can add value and be a catalyst for positive strategic change.

3.2 Methodology

The Strategy was developed using an approach to corporate strategic planning, standard in the IT industry. Starting with Vision 2026 and the workshop group's understanding of the Region's political and economic environment, its direction and service imperatives, seven Guiding Principles were developed as a foundation for information technology decisions.

3.2.1 The Guiding Principles

Workshop participants identified the following seven principles to guide the decision making process on information technology projects and associated IT investments:

- Customer Service
- Support for the Region's Core Business Needs
- Integration of IT Applications at Every Opportunity
- Strategic Investment in IT (Value For Money)
- Collaboration and Cooperation
- Alignment with Vision 2026 and Integration with other Government Jurisdictions
- Providing Secure & Responsible Information Management in Accordance with Legislative Requirements

3.2.2 Measuring Contribution and Progress – The 10 Key Strategic Outcomes

The workshop participants identified 10 Key Strategic Outcomes which the IT Strategy aims to deliver. They outline where the group sees the Region growing in the use of information technology to deliver value to the organization over the next 5 years. They highlight the strategic directions for York Region to pursue in order to deliver on these outcomes. Contribution of information technology projects to these 10 Key Strategic Outcomes also forms a "scorecard" in terms of how the Region is maturing in its strategic use of technology.

1. Secure & Reliable IT Infrastructure
2. IT Aligned with Business
3. Value Driven Strategic IT Investments

4. Customer-Centric Service Delivery
5. Online Government Transformation
6. Enabled Knowledge Workers
7. Region-Wide Online Employee Access
8. Streamlined Processes through Data Sharing & Integration
9. Maximized External Partnerships and, (once the above outcomes are realized)
10. York Region would be 'Recognized' for best practices

Prioritization of information technology initiatives using the above outcomes links IT to the mission critical applications of the Region. This will optimize Regional departments' ability to deliver customer-centered, cost-effective, quality programs to the Region's growing population and businesses. This will in turn, enable sustainable improved performance of the organization as a whole.

3.2.3 IT Initiatives & Projects - Prioritization Process

Just before the IT Strategy work commenced in the fall of 2004, the Information Technology Services Branch had catalogued a "waiting list" of over 200 IT project requests from departments along with regular maintenance and growth projects needed to sustain the existing information technology infrastructure. These projects were grouped into 32 programs (Initiatives), based on common project characteristics.

Using the 7 Guiding Principles and the 10 Key Strategic Outcomes, each of the 32 programs (Initiatives) were assessed by the workshop participants using a series of evaluation processes that poses basic questions and the associated answers:

Questions Posed

Associated Answers

What are the most pressing Initiatives / Projects

Project Prioritization

Why are we Doing this Initiative / Project

Contribution to the 10 Key Strategic Outcomes – including costs/benefit analysis

Adherence to Guiding Principles

Who benefits / **Who** is affected

Client Impacts

When – do these Initiatives / Projects need to start / finish in the 5 year plan

Project Scheduling

Through this framework, the IT Strategy identified the programs (Initiatives), their relative priorities, the budget categories (Base, Growth, Mandatory and Enhancement), a 5 year implementation schedule, as well as the shared responsibility for program delivery between ITS branch and the various departments. Annex A provides a brief overview of the 5 Year Plan.

Some of these programs and initiatives are dictated by other levels of government. In the event that there is a change to current legislation or a change by Provincial or Federal partners to existing and or new programs, the above priority setting framework in the Strategy can be changed or adjusted with input from the CTRC.

Key corporate projects/initiatives that are scheduled to commence during 2005 include:

- Converged ITS Networks (Data & Voice)
- E-Portal Strategy
- Customer Relationship Management (CRM) Strategy
- Broadband Strategy in the context of the OneYork Initiative
- ITS – Data Centres
- Maximizing Peoplesoft modules
- E-Docs Document Management Implementation

A presentation of the details of many of these was given to the Sub-Committee at its January 2005 meeting.

In addition to the above major corporate projects, there are a number of Departmental projects with a significant IT component that are also scheduled to commence during 2005. Planning and implementation of these are incorporated in the Departmental business plans.

3.3 Roles & Responsibilities

Considerable time was invested in the workshops to determine where each of the 32 initiatives and their associated projects belong in terms of three categories: whether they would be driven by and funded corporately through the ITS Branch; from the requesting Department with help from ITS or from the requesting Department who is employing a third party technology supplier. This assessment was needed to ensure proper distribution of roles and responsibilities in accordance with available resources. Alternative Service Delivery (ASD), including outsourcing some of the IT tasks and functions, is an integral component of this categorization process.

4. ANALYSIS AND OPTIONS

The IT Strategy is a framework for assessing IT investments and allocating the limited IT resources. The Strategy will evolve over time as the Region undertakes significant projects to realize the Key Strategic Outcomes. Among the significant steps that need to be undertaken for the implementation of the Strategy is the development of an overall Enterprise Architecture (EA). The EA approach takes a holistic and comprehensive view to data architecture, application architecture and technology architecture. Designing IT service delivery must include due consideration of the Region's EA as a foundation for the IT Strategy and for the 5 year work plan.

The IT Strategy describes a new IT Service delivery model which will be implemented over time in consultation with key stakeholders in the operating departments. The service delivery model calls for IT as a centralized function with a decentralized service delivery.

Another significant next step is deploying the IT Strategy framework for the development of the annual IT Initiatives Budget. Already the ITS Branch has used the Strategy framework for the 2005 Initiatives Budget. Each corporate program/project is identified and the associated 2005 costs are compiled.

Furthermore, a business case must be developed for each corporate and departmental IT initiative. The business case must identify the costs, benefits and the expected return on investment from the implementation of the program or initiative.

The Converged Network initiative in particular will highlight the case for integrating the data and voice networks into a single network which will, in turn, be aligned with the One York vision and the Broadband Strategy.

Finally, the IT Strategy calls for building partnerships and relationships with various levels of government and the private sector, including the identification of funding opportunities for joint initiatives. This is again in keeping with the One York vision.

5. FINANCIAL IMPLICATIONS

The implementation of the various projects in the IT Strategy and 5-Year Plan will be subject to Council's approval of the IT Initiatives as submitted to Council in each of these 5 years. The priority actions identified this year can be undertaken within the approved 2005 Operating (Initiatives) Budget of the ITS Branch of the Finance Department.

6. LOCAL MUNICIPAL IMPACT

In building major partnerships such as with the proposed OneYork initiative, there may be opportunities to share resources and reduce the costs to both the Region and the area municipalities.

7. CONCLUSION

The draft York Region Information Technology Strategy developed over the past 6 months through consultation with stakeholders represents a blue print for the effective deployment of IT in the Region over the next 5 years. The IT Strategy will be distributed for comment to the area municipalities and to other stakeholders who participated in the process.

The Senior Management Group has reviewed this report.

(The attachment referred to in this clause was included in the agenda for the April 20, 2005 Sub-Committee meeting.)