



Joint Portal Report

Finance & Administration Committee

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Presentation Topics



- ❑ Portals – a review
- ❑ Background to the Joint Portal Project
- ❑ The RFP Process
- ❑ Staff Recommendations

Portals: Overview

- New way of interacting both within and outside organizations

*Transforming
Enabling
Connecting*



The Internet has irrevocably altered public expectations of government. Citizens from around the world, especially the young generation, are demanding fast, simple access to relevant information and basic services.

What are Portals?



- ☐ If a **website** is like a magazine, a **portal** is like the counter in a general store
- ☐ **Portals** are more dynamic than websites and provide a single access point to web information, media, services and applications
- ☐ Portals are personalized to each user's needs (citizens, employee, business, government) – “My York Region”
- ☐ Well-designed portals are easy to use, which results in more visits to the portal and encourages self-service
- ☐ Portals streamline enterprise processes and are scalable – from the once per year process to 000's of transactions per hour

What Do Portals Do?



Collaboration



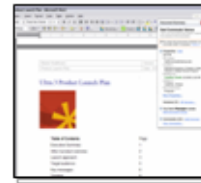
Community Content



Public Interaction



Education Services



**Centre for Information
& Community Services**



Community Services



Housing/Settlement

**Common
Content
Requirements**



PORTAL



**Content
Managers**



**Physical Web
Servers in the
HOST
Data Centre**

What are the Portal Benefits?



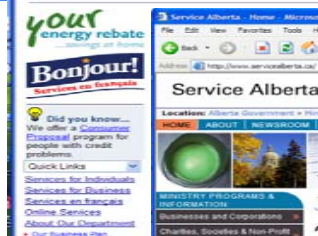
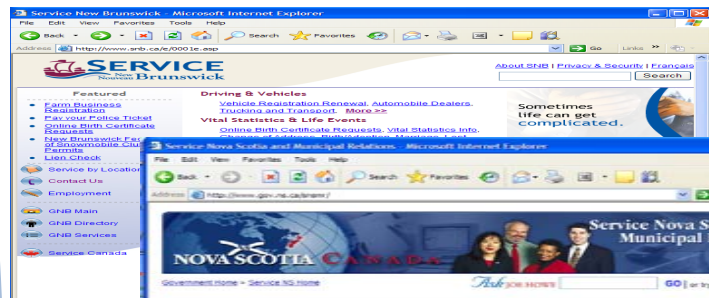
- ☐ Provide immediate access to personally-relevant information and services
- ☐ Streamline access to job-related information by offering different views-by business process, project, objective, etc
- ☐ Promote reuse and increased productivity through the integration external information sources, e.g. swimming class schedule and road report
- ☐ Promote greater usability by providing customisation, e.g. a subscription to specific information like council meeting minutes
- ☐ Increase content relevance and promote reuse by allowing content to change based on the context it is viewed.
- ☐ Portal technology simplifies information access by supporting multiple devices: PC, PDA, Cell Phone, iPhone, etc.
- ☐ New functionality and capacity can be added quickly and with little effort using portal technology

Drivers for Portal Investment



- ❑ York / Markham Joint Portal - Qualitative benefits
 - ❑ Improved customer service
 - ❑ Increased citizen engagement
 - ❑ Operational efficiency
 - ❑ Demonstrate municipal leadership
- ❑ Treasury Board of Canada - IT investment
 - ❑ Comparative advantages: More time spent on highly-valued activities
 - ❑ Level-of-service advantages: Improved client access to services
- ❑ Government of Ontario – portal guide
 - ❑ Seamless & speedy access to information, expertise & services

Governments are all Going Online Services Route!



Portal-Illustrative Example

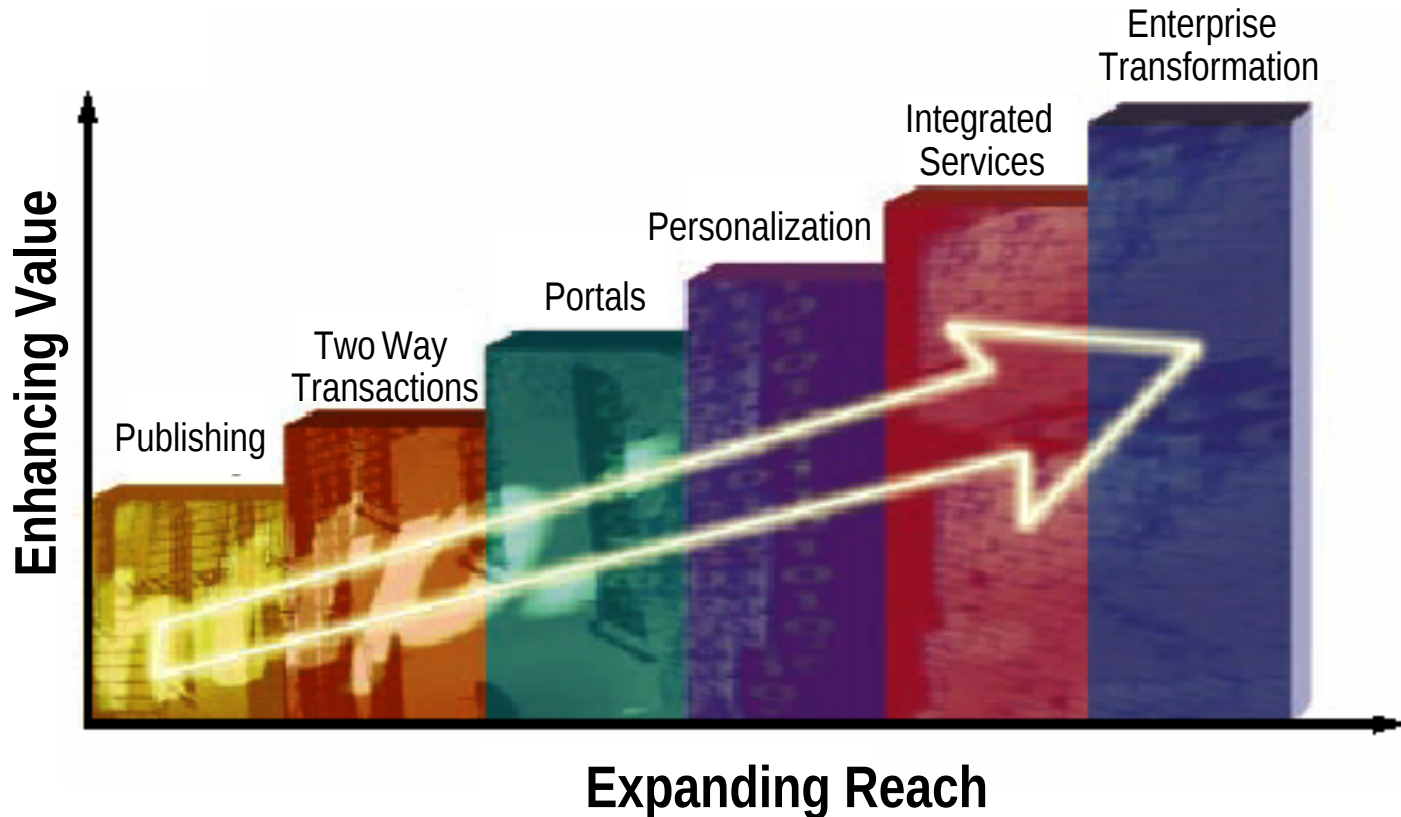


Alert
Program registration
Garbage pickup
Property tax
Building inspection
Citizen engagement
Complaints
Emergency notification
Licenses
Permits
Document/Content
Management

GOAL

An integrated and efficient workplace
whose service offerings are accessible
from anywhere at any time

eGovernment-Beyond Websites



- ❑ The Bottom Line: Governments must take a long-term, enterprise-wide view of customer service operations to make e-Government successful

Key Considerations

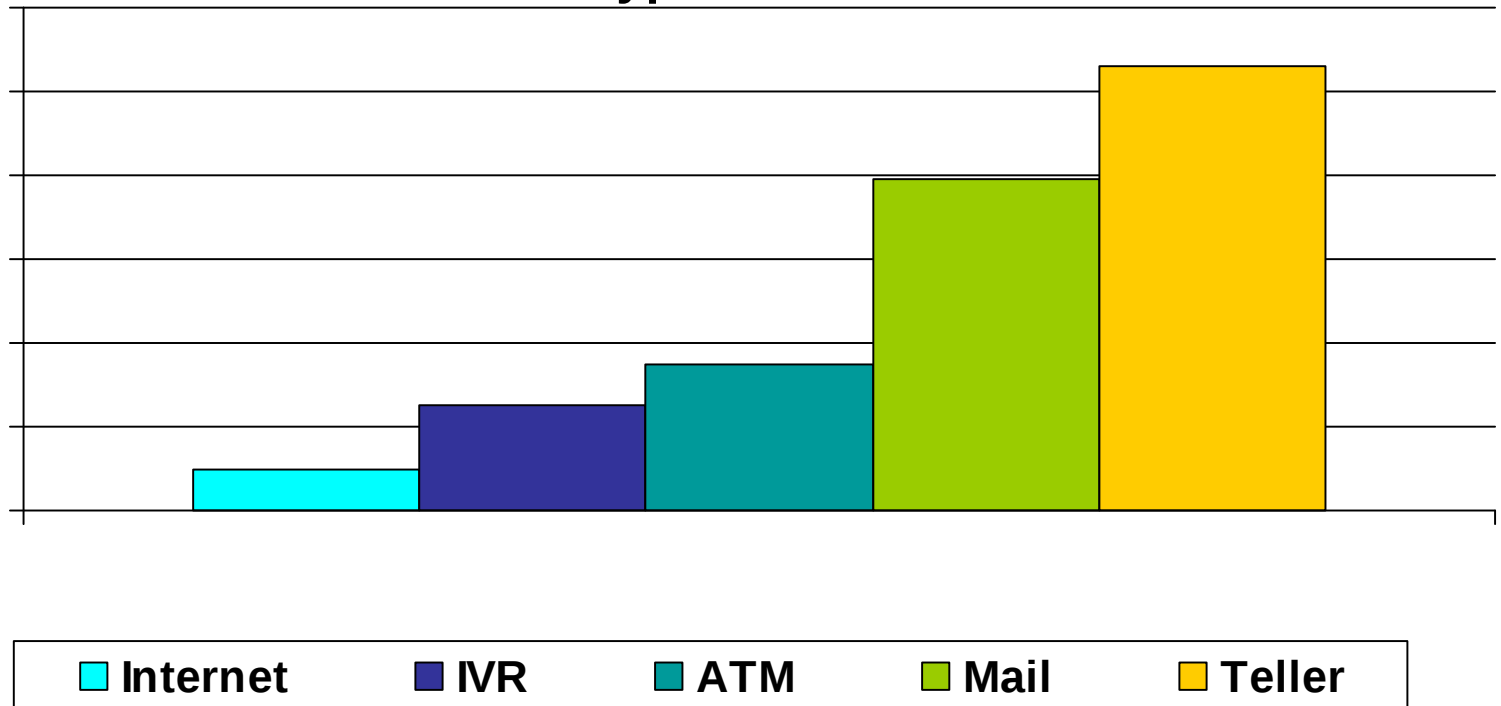


- ☐ Portals form one dimension of a multi-channel service delivery strategy – along with other channels like phone, fax, traditional mail, email, over the counter, etc..
- ☐ Multi-channel service delivery strategy begins with a vision and addresses:
 - ☐ Channel preferences
 - ☐ Service policies
 - ☐ Organizational capacity
 - ☐ Program transition funding
 - ☐ Technology and infrastructure capabilities

Transaction Costs



Typical Bank



(Source: Mentis Corp/Wall Street Journal/BOOZ Allen Hamilton)

Joint Portal –Alignment with York and Markham Visions



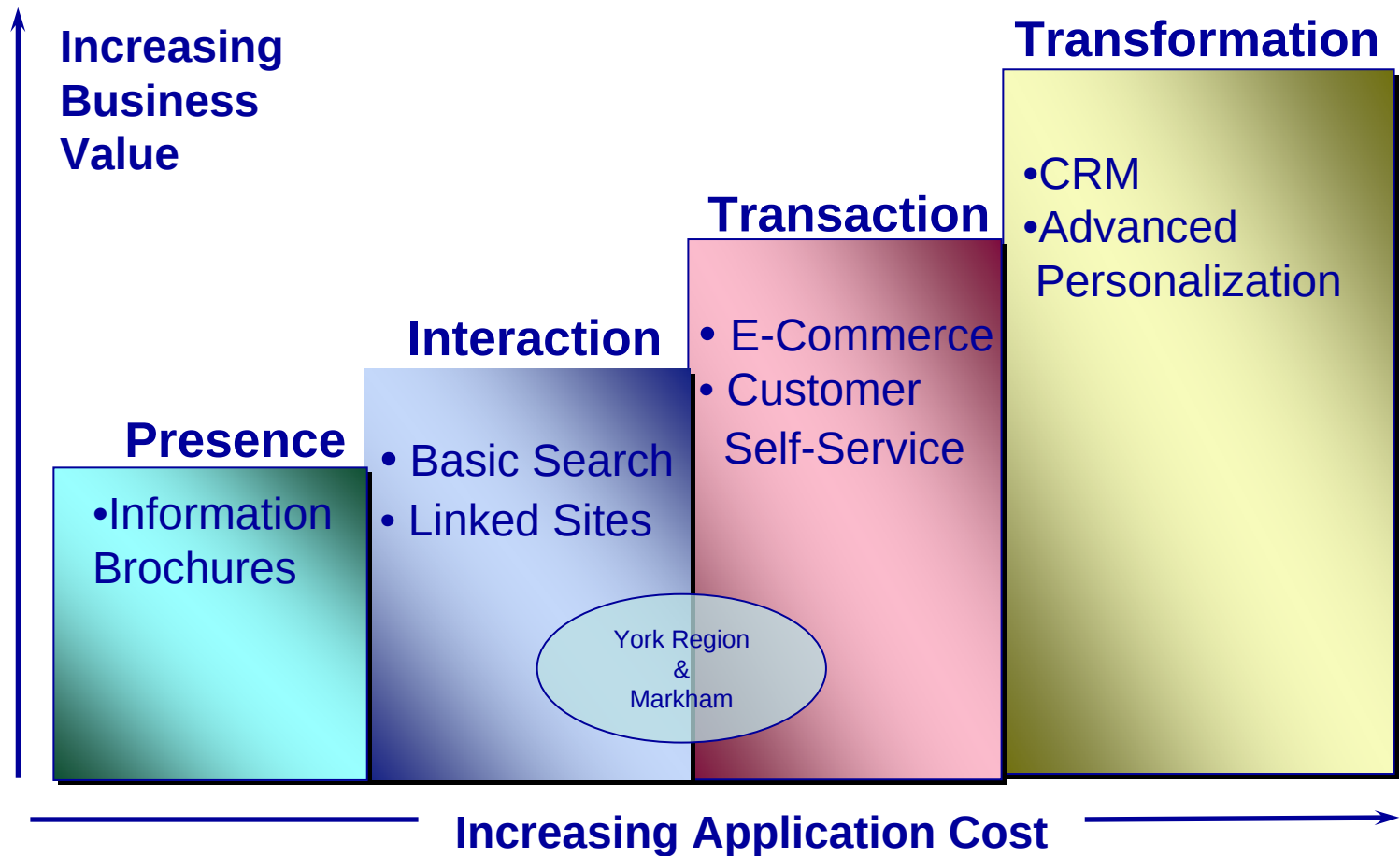
☐ York's Vision 2026

- ☐ Provide leading-edge municipal services;
- ☐ Provide advanced technology adoption and implementation;
- ☐ Demonstrate diversity and innovation in service delivery;
- ☐ Address the challenge of demands for urban service levels in rural communities;
- ☐ Increase businesses' awareness of the Region's services;
- ☐ Make services/information available regardless of personal mobility; and
- ☐ Enable residents and businesses to access services regardless of location.

☐ Markham's long term vision

- ☐ The Town will be a leader in e-government services...
- ☐ ...a leader in delivery of high quality municipal services
- ☐ Our communities ... feel connected
- ☐ ... best location for diverse high-tech and related businesses;

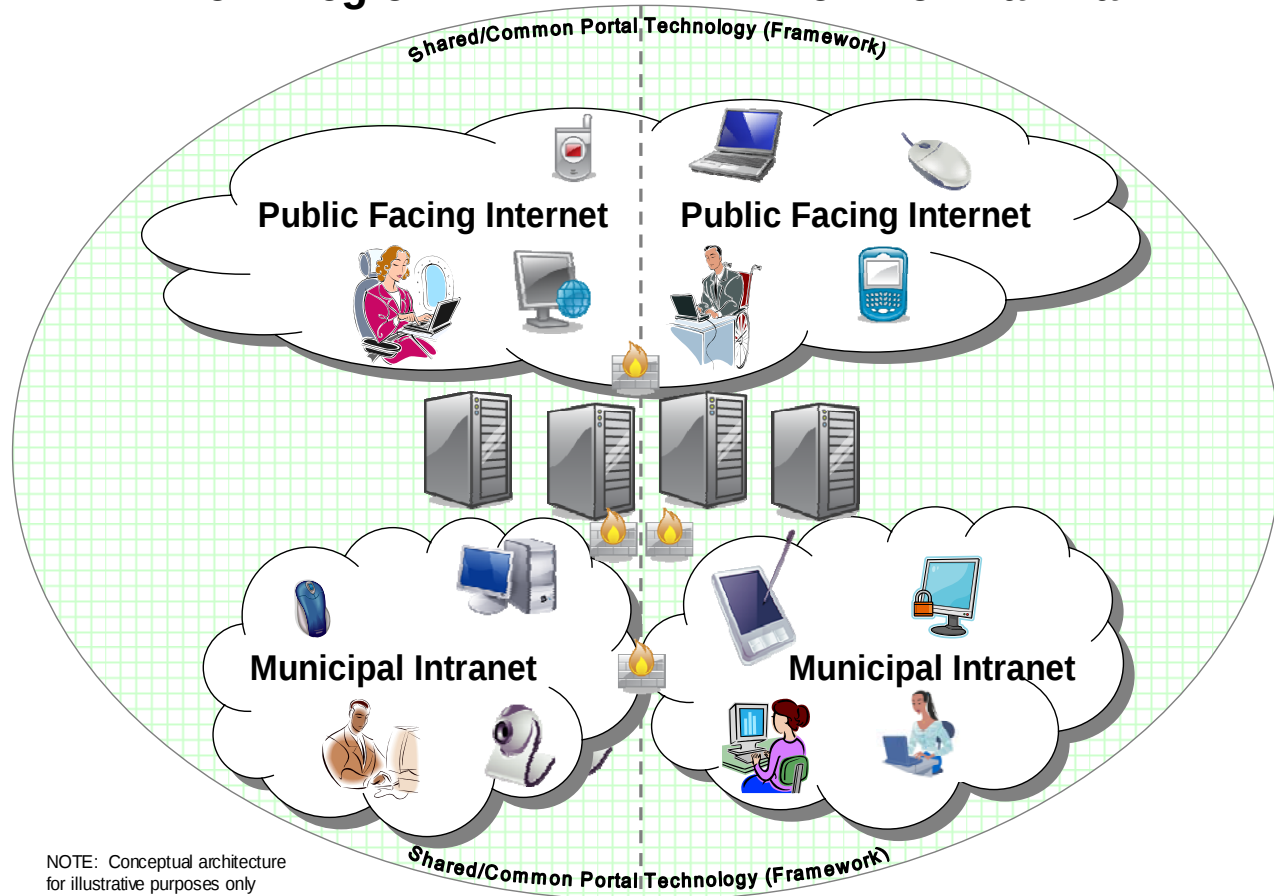
eGovernment/Portals Move Us Up the Steps



Conceptual Joint Portal Future State

York Region

Town of Markham



Background - Much Work Has Been Done



- ☐ 2005- 2006 IT Strategic Plans endorsement by councils of York and Markham including Portal Plans –
- ☐ Nov. 2005 Markham carries out Portal Business Value Assessment (BVA) –
- ☐ 2006 - Joint portal business Plan (York/Markham)
- ☐ Feb 07- Joint Portal Business Case Report
- ☐ Oct 07- Regional Council approval to Issue RFP for Joint Portal
- ☐ Jan 08 – RFP Issued
- ☐ Oct 08 – Markham Council Approved Similar Recommendations to those in this Presentation and York Staff Report

RFP for the Joint Portal



- ☐ Vendors were encouraged to propose two solution scenarios:

- ☐ Vendor Hosted

- ☐ Client-hosted

- ☐ The Joint Portal Solution must be flexible enough to be deployed both externally (for public) and internally (for staff)
- ☐ The Joint Portal Solution must be scalable to accommodate subsequent participation by the other local municipalities in the York Region

Note: Markham-only portal issued as part of the RFP, but responses not reviewed

The Evaluation Team



- ☐ Markham: **Building, Markham Public Library, Information Technology Services, Finance, Recreation Services, and Asset Management Departments**
- ☐ York Region: **Geomatics Group, Information Technology Dept., and Community and Health Services.**
- ☐ Other Municipalities: **Town of Richmond Hill, Town of Aurora, Town of East Gwillimbury, and Town of Newmarket.**

Mandatory Requirements



- ☐ Content Management System, Search and Personalization
- ☐ Event Calendar
- ☐ Registered User Authentication (Single Sign-On)
- ☐ Payment Engine
- ☐ Directories
- ☐ E-Mail Newsletters/Notifications
- ☐ Surveys
- ☐ Information/Service Requests, Feedback and Complaint Processing
- ☐ Systems Management and Reporting (Utilization Statistics)
- ☐ License Services (Business)
- ☐ License Services (Animal)
- ☐ Parking Ticket Payment
- ☐ Provincial Offences Act Ticket Payment
- ☐ Resource/Facility Booking and Payment
- ☐ Program Registration and Payment
- ☐ Event Ticket Ordering and Payment
- ☐ Property Tax Calculator
- ☐ Document Management
- ☐ Access to Other Systems
- ☐ Third Party Application Integration
- ☐ Procurement
- ☐ Emergency Management Application
- ☐ Project Status Dashboards and Performance Dashboards
- ☐ Alerts

The RFP Process



- ☐ 5 Firms submitted responses
- ☐ These were reviewed by the Evaluation Committee
- ☐ Consultants retained
 - ☐ Chartwell Inc.: RFP review & evaluation
 - ☐ Bob Tapscott, Professional Services Procurement Plan
- ☐ 3 short- listed vendors
 - ☐ IBM is the highest scoring & lowest cost proponent
 - ☐ Hardware, software & support – \$1.58M + taxes
 - ☐ Professional Services component – expensive
 - ☐ Only IBM offered vendor- and client-hosting options

Recommendations



- ❑ Award hardware, software & support services to IBM (highest score, industry strength) for \$1.58 M + taxes



- ❑ Implement the professional services component in phases and through competitive process in accordance with the Professional Services Procurement Plan



- ❑ Further investigate hosting option



- ❑ 50% cost sharing between Markham and York Region for the initial phase



Professional Services Procurement Plan

Rationale for this Plan

- ☐ Prioritization of requirements & implementation plan
- ☐ Invest as we go based on capacity and financial affordability
- ☐ Possible competitive price for professional services
- ☐ Manage projects in phases with tangible results – flexible & less risky
 - ☐ Initial phase – enhanced design/look, payments, permits, collaboration & other self-service capabilities
 - ☐ Citizens interaction - increased customer service: seamless access to service/info/ people, anytime/anywhere, personalized; public engagement; complaint
 - ☐ Staff (Intranet) - enhanced efficiency, faster response, quick service deployment
- ☐ First phase – Target is end of 2009, 2nd release - summer 2010





Thank you for Listening!

Questions?



