Haldimand County

ITS-04-2025 Haldimand County Corporate Digital Innovation Strategy

For Consideration by Council in Committee on October 28, 2025

Objective:

To present the Haldimand County Corporate Digital Innovation Strategy (HCCDIS) to Council and seek formal adoption of the plan to allow staff to further refine timing and resources of the proposed deliverables within the HCCDIS.

Recommendations:

1. THAT Report ITS-04-2025 Haldimand County Corporate Digital Innovation Strategy be received;
2. AND THAT the Haldimand County Corporate Digital Innovation Strategy and associated appendices as attached to Report ITS-04-2025 be approved in principle.

Prepared by: Mike Brousseau, Chief Innovation Officer

Respectfully submitted: Megan Jamieson, CHRL, General Manager, Corporate Services

Approved: Mark Merritt, CPA, CA, Interim Chief Administrative Officer

Executive Summary:

The Haldimand County Corporate Digital Innovation Strategy (HCCDIS) is one component of Haldimand County's ongoing approach to strategic visioning. This five year plan documents an ideal digital transformation of services and solutions to ensure that Haldimand continues to evolve to meet the diverse needs of our corporation and community.

The HCCDIS envisions delivering **"services you expect, when and where you want them, delivered by technology, data and people."** This vision establishes a citizen-centered, outcome-driven mandate to transform municipal service delivery and internal operations. At the heart of this transformation is the recognition that modern municipal service delivery requires more than just new technologies, it calls for rethinking how services are designed, delivered, and experienced. The strategy identifies three core areas of focus - People, Data, and Technology. Each are essential components for achieving this vision.

To bring this vision to life, the strategy outlines a set of key proposed initiatives, supported by a broad implementation roadmap, structured across three phases: Building, Exploring and Inspiring. These phases provide a flexible framework to guide progress over time, allowing Haldimand County to adapt as needs evolve.

The overall goal is to enhance staff productivity, streamline processes, and provide digital experiences that mirror the ease and accessibility of leading private-sector services. To achieve this the strategy calls for a reimagining of the role of Innovation Technology Services (ITS); transforming it from a reactive service provider to an active strategic partner in service design, modernization, and delivery.

Ultimately, this digital innovation strategy is not a one-time project but a dynamic, organization-wide journey. Anchored in service excellence, strategic alignment, and a people-first mindset, it charts a clear path toward a resilient, efficient, and citizen-centric digital future.

Background:

Innovation & Technology Services (ITS) has never undergone a comprehensive and collaborative process to access the needs of the organization and our community, as it relates to digital services and technology. This type of assessment is imperative to ensure that staff are making decisions that support the long term direction of Haldimand County. Accordingly, staff engaged a formal review process to identify the needs of Haldimand stakeholders, as outlined below.

Consultant Selection and Approach

In February 2024, Haldimand County issued a public Request for Proposal (RFP) for a consulting firm to support the development of the digital strategy known as the Haldimand County Corporate Digital Innovation Strategy (HCCDIS). After extensive evaluation, Perry Group Consulting was selected, having previously supported Haldimand on ITS reorganization and the Money, Assets, and People project.

The Perry Group approach to strategy development follows three phases:

- Discover: assess the current state through document reviews, surveys, interviews and workshops, summarized in a Discovery Report.
- Strategize: explores future directions, prioritizations and solutions.
- Plan: delivers a collaborative roadmap to guide the County's digital transformation toward the desired future state.

Discovery

The development of this strategy was approached not through an ITS lens but instead with a corporate-wide perspective at the forefront. To help guide the process, the Senior Management team (SMT) and divisional staff were engaged for awareness and input throughout the project. These groups participated in a series of workshops and meetings to shape the Strategy and develop the Vision and principles. Perry Group facilitated these sessions and the creation of this Strategy.

Over the period of engagement in Discovery, consultants met with 68 people (not including ITS staff) throughout the organization, holding more than 18 focus-group interviews and workshops across 30 lines of County business, in addition to working directly with the ITS team. An all-staff survey was also conducted, with 161 responses representing diverse opinions and perspectives of staff in every division. The findings of these engagement efforts are summarized in Appendix 1 of the HCCDIS Final Report (Attachment 1).

Ultimately, the Discovery phase concluded that, while the organization was ready and willing to explore new/enhanced digital tools to improve efficiency and effectiveness in service delivery, Haldimand still has work to do in building the technology foundations as well as process improvements. Work is currently underway in both ITS and across the organization to improve the current state to become better equipped to pursue service delivery process improvements and technology projects.

Strategization

Through the process of reviewing the results of the Discovery phase with the ITS Project Team and SMT, the findings were summarized into key strategic themes. These themes then shaped the design of workshops, which explored those areas of focus in more detail and set direction for the HCCDIS.

Specifically, the workshops involved the ITS team (regarding Cloud adoption and security considerations), the Corporate Digital Advisory Group (to share digital experiences and opportunities), SMT (establish a vision and explore governance model), and the ITS leadership team (service modernization).

The outcomes of the collaborative workshops and other activities held during the Strategize phase helped to establish important directions for the Digital Innovation Strategy. Details on the workshops are included in Appendix 2 of the HCCDIS Final Report (Attachment 1).

Planning

The strategy being presented today, is the final of five major versions developed over an eight month time period, reflecting consultation from multiple internal groups, in conversation with Perry Group Consulting, and distillation of the previous two phases of the project. Iterations of this final draft plan have also been reviewed and supported by the Innovation & Technology Governance Committee and the Innovation & Technology Service division.

While staff had initially hoped to complete the strategy within a 12 month period, attention was paid to ensure that changes to the Haldimand County Strategic Plan and Haldimand County organization structure were integrated into the plan, delaying completion.

Analysis:

The Vision

The Vision for the Corporate Digital Innovation Strategy is to deliver:

“Services you expect, when and where you want them, delivered by technology, data and people”.

This Vision highlights the goals to be a municipality that:

- Is citizen-focused (or user-focused);
- Transforms delivery of municipal services for better outcomes; and
- Improves internal business processes through effective use of platforms, solutions and tools.

This Vision is aspirational and can act as a guiding light for the cross-departmental work required to achieve it. To deliver the level of services expected, there is a need for a focused effort on building and supporting the technology, data opportunities and the people involved in service delivery across the organization.

Achieving the Vision, meaning to become a service-centered, digital organization, is a long-term endeavour, more like a marathon than a sprint. It requires time, patience, determination, and sustained commitment and investment.

This journey is expected to be comprised of three phases: **Building, Exploring,** and **Inspiring** that link three integrated areas of focus**: Technology, Data, People –** the Enabling factors. These areas of focus will continue to evolve through ongoing service modernization and business process improvements. With the adoption of this Strategy, Haldimand embarks on a focused path toward digital innovation.

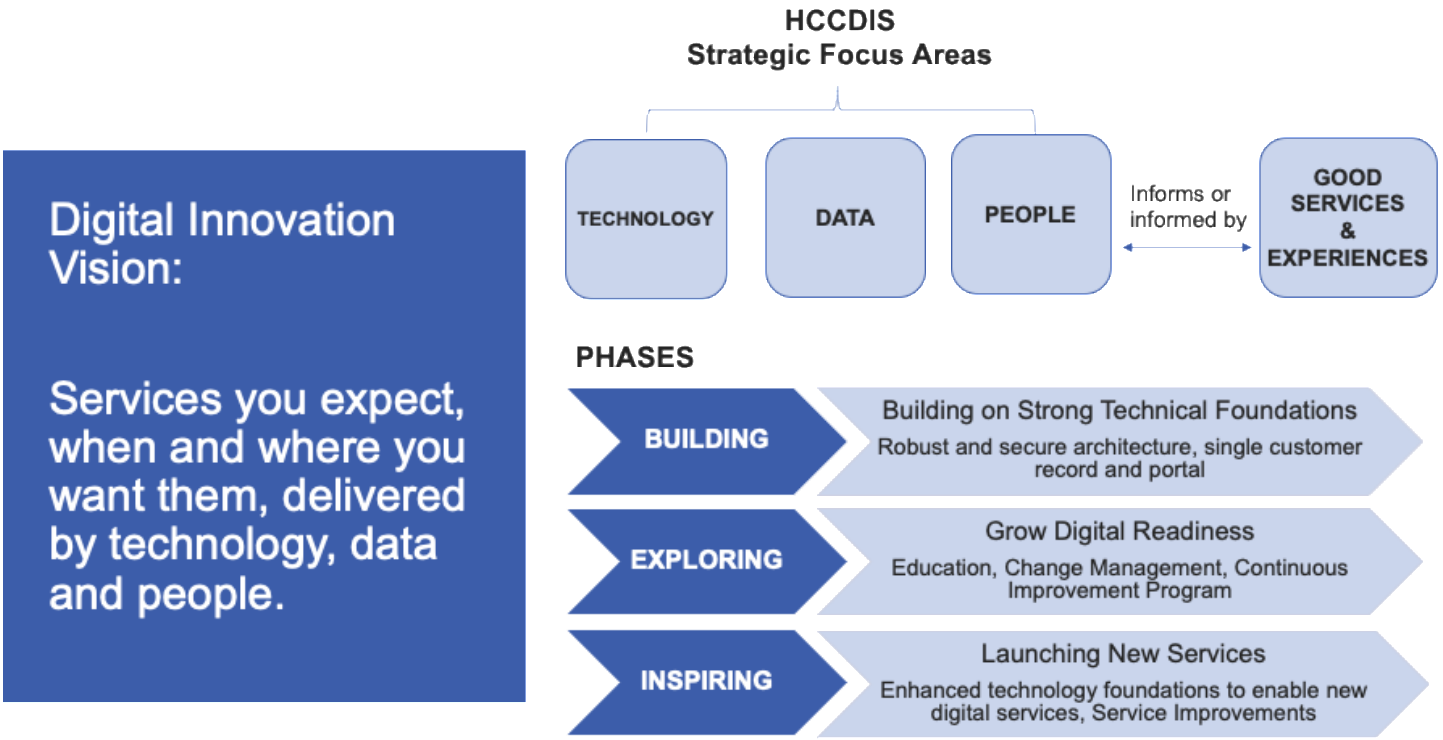

Figure 1: Digital Innovation Vision

This philosophy ensures the Corporate Digital Innovation Strategy is not only technologically advanced but also sustainable and aligned with organizational goals. By focusing on **People**, we recognize that employees are the backbone of any successful digital initiative. Investing in their skills, training, and engagement ensures they are well-equipped to leverage new technologies effectively. This approach fosters a culture of innovation and continuous improvement, empowering staff to drive Haldimand's digital and service transformation forward. People does not just refer to innovation & technology services staff but all Haldimand County staff.

Next, prioritizing **Data** is essential before introducing new technologies. Accurate and well-managed data forms the foundation upon which technology can be effectively implemented. By thoroughly understanding and improving data management practices, we can identify areas where technology can add the most value. This step ensures we are not merely automating existing inefficiencies but are fundamentally enhancing how we operate. Clear, well-defined data governance and management processes also facilitate smoother technological adoption, as employees can more easily integrate new tools into their daily routines.

Finally, investing in **Technology** becomes the capstone of this Strategy. With a well-trained workforce and optimized data management practices in place, we can make informed decisions about the technological solutions that best meet our needs. This approach minimizes the risk of technology misalignment and maximizes return on investment. By following the People, Data, and then Technology philosophy, Haldimand can achieve a balanced and effective digital transformation, ensuring long-term success and resilience in an increasingly digital world.

Proposed Key Initiatives

The Implementation plan is proposed in three phases – Building, Exploring and Inspiring that are phased out over the next 5 years. These are supported by the Enabling initiatives.

Phase	Proposed Key Initiatives

Building	• Digital Innovation Strategy Mobilization
	• Further Cloud Solution Adoption, Policy & Roadmap
	• Implementing Microsoft 365 as a Core Collaboration Platform
	• Review, Enhance, and/or Replace Core Business Solutions:
	  ○ Financial System Solutions;
	  ○ Human Resource Information System Solutions;
	  ○ Work and Asset Management Solutions;
	  ○ Document Management Solutions; and
	  ○ Property Tax and Water Billing Solutions.
	• Modernizing Legacy Systems
	• Review, Enhance, and Document Cybersecurity Risk and Resiliency Practices

Exploring	• Explore CRM and Citizen Portal Readiness and Implementation • Complete Service Inventory and Service Design Process • Explore Standardizing Online Payment Processes • Create Solution Integration Standards • Create Data Management Plan and Data Governance • Supporting Business Applications
Inspiring	• Enhance the Customer Experience (such as a single sign-on portal) • Continue to improve on reporting and analytics tools and processes • Explore Artificial Intelligence Opportunities • Operationalize Service Design and reviews • Expand the Open Data Program • Develop and Document ITS Internal Service Level Agreements • Develop a future roadmap for Technology Architecture • Publish Service Delivery Performance metrics
Enabling	• Organizational Change to the ITS Department • GIS Strategy • Develop a Digital Mindset across the organization • Formalize Collaboration Channels • Expand Training Opportunities • ITS Skills Assessment • Change Management Initiative

Table 1: Proposed Key Initiatives of HCCDIS

ITS Organization

A successful Digital Innovation Strategy depends not only on strong technology foundations but also on the skills and resources needed to drive projects forward. This requires adherence to sound architectural principles, a focus on data management and integration, and a commitment to securing key data assets.

The role of technology has evolved. Information, data, and digital capabilities must be embedded in everything Haldimand does to become a truly digital organization. Service owners, managers, and staff can no longer afford to be indifferent to technology – digital service delivery is now a necessity, not an option.

ITS Organizational Role

Developing digital literacy across the organization is essential to fostering a culture of efficiency, effectiveness, service excellence, and continuous improvement.

Historically, the ITS division has been seen as a reactive, back-office function – a utility provider tasked with maintaining operations or executing projects handed down to them. To support innovation, ITS must evolve into a strategic partner, working alongside business departments to modernize processes, improve service delivery, and drive transformation.

SMT supports this shift, from the “Utility Provider” to a “Partner Player”, realizing the benefits this partnership will bring in achieving Haldimand’s strategic goals.

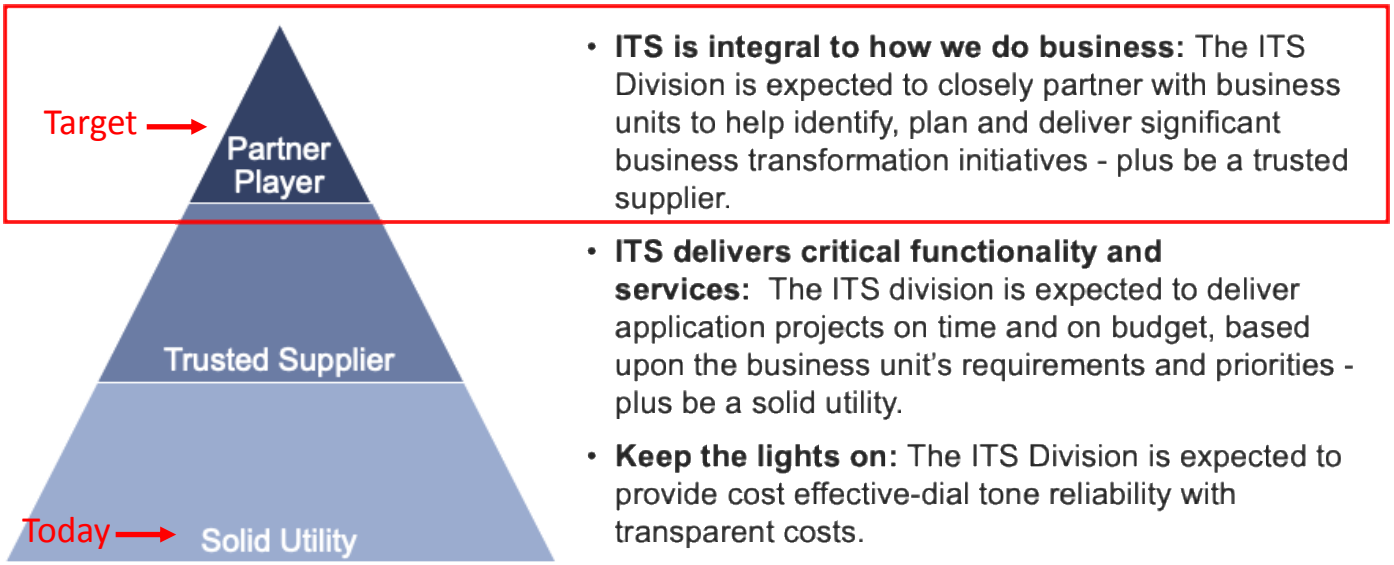

Figure 2: Graduated growth of IT in business.

It should be recognized that, to support this shift, strong collaboration between ITS and business units is essential. A shared understanding of roles and responsibilities will help ensure success. ITS plays a key role in guiding digital strategy and enabling business ideas through technology. In turn, early engagement from business departments, especially when acquiring new solutions or making technology related decisions, helps to ensure seamless integration and alignment with strategic goals.

ITS Staffing

To effectively support Haldimand’s shift towards a service-centered, digital organization, it is essential that ITS has the right structure and resources in place. This need is driven not only by the importance of strong collaboration between ITS and business units, but also by the growing demand for faster

responses to market changes, evolving customer expectations and the overall strategic goal of embedding digital capabilities across the organization.

The Perry Group has outlined recommendations that represent an “ideal future state” for the organizational structure of the ITS division. Recommendations include the introduction of three (3) new staff positions and the reorganization of the division from two teams into three. The addition of a third team, within ITS, puts a dedicated focus on delivery of digital services, including IT project management, and user support (via the IT service desk), to ensure that ITS is supporting the digital initiatives from start to end. Further detail and rationale for each proposed change is articulated in the strategy.

This report does not seek approval for these recommendations, at this time. Implementation of the Perry Group’s recommendations are subject to further review and approval. The Senior Management team will continue to assess the ITS structure through the regular staffing and budget initiative process, taking into account the number and pace of key initiatives in addition to resources available across the organization.

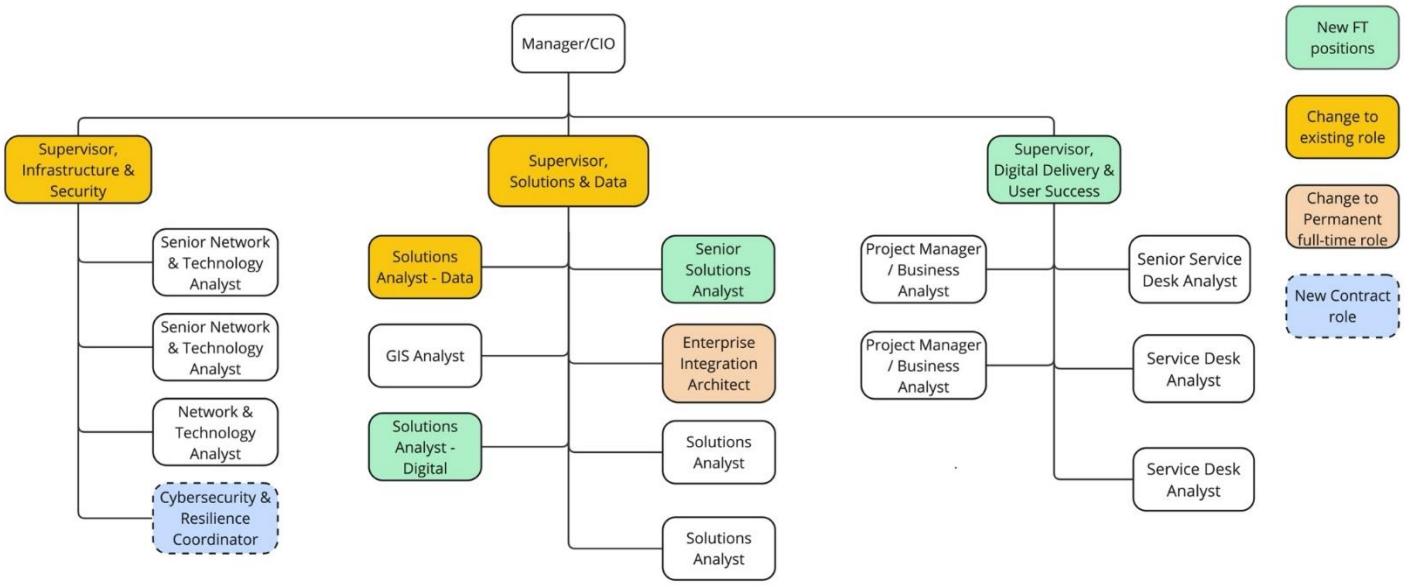

Figure 3: Recommended Organizational Structure of the ITS division.

Corporate Partnership

As Haldimand’s goal is to deliver end-to-end digital services that flow from front-line user interactions to back-office operations, it is vital this transformation be recognized as a shared responsibility across the organization. Successfully implementing the Strategy will require participation from all affected departments, including the allocation of business operational staff time to support key activities.

Many of the proposed initiatives will benefit from multi-functional teams that bring together expertise of service operations, user needs, technology and strategic planning. This collaborative approach ensures that digital solutions are not only technically sound but also aligned with real service needs and organizational goals.

This requires commitment from leadership to consider practical staffing needs, when establishing work plans for continuous improvement and technology projects, rather than assigning work informally, and in addition to day-to-day work. To reduce risks to projects and digital innovation, leadership should review capacity as part of annual business planning activities, and the IT Governance Committee should monitor and report on this capacity throughout the year. Further, it is important to acknowledge

that under this strategy, business departments have direct responsibility for digital services, in addition to those responsibilities held by ITS. Users can demonstrate this effectively by:

- Being strong digital service owners, with intent to offer modern and expected services;
- Owning business and operating models, business processes, their design and re-design;
- Being curious and open to change;
- Partnering with ITS early to ideate, conceptualize and propose initiatives (new, changes to existing); and
- Leading projects, where appropriate and according to an agreed project methodology, and by providing project status reporting.

Conclusion

Haldimand County's Corporate Digital Innovation Strategy represents not just a modernization of systems, but a fundamental rethinking of how municipal services are designed, delivered, and experienced. At its core, the strategy is anchored in the principle that technology, data, and people must work together to create services that are accessible, efficient, and responsive to the evolving needs of residents.

Today, modern municipal services should be personalized, localized self-service (available anytime, anywhere) for customers enabled by web and digital services. Of course, there is always the need to provide services to those who are not able or willing to use digital means; for them, the use of assisted digital with help through a customer service centre will be available.

By embracing these digital tools, Haldimand can re-design services to be more efficient, responsive, and cost-effective. While in-person and phone support will always be available, the goal is to create digital services so intuitive and convenient that most people will prefer them.

These municipal services are supported by simplified and automated workflow-based back-office processes, and digitally connected staff (wherever they are) to better deliver the service. These services provide process and performance insights (data and analytics) and are further enabled by ongoing (Lean-based) continuous improvement. The proposed Digital Innovation Strategy outlines a clear, deliberate approach to harnessing this potential.

Financial/Legal Implications:

There are no direct financial or legal implications to this report. While, the processes and projects proposed throughout the attached HCCDIS have estimated timeframes and costing associated with them, each of these projects is subject to further analysis, planning and authorization. Any costs associated with the proposed initiatives, including any future staffing implications, will be brought to Council through the normal budgetary and personnel processes, as the plan becomes refined and actioned year over year.

Stakeholder Impacts:

The Haldimand County Corporate Digital Innovation Strategy, once fully implemented, will have lasting positive impacts for everyone who engaged with Haldimand County and our services including residents, business owners, community organizations, and staff. The on-going transition to well thought-out digital services ensures that everyone who uses our services can do so in the way they prefer (even if that means face-to-face) when it's convenient for them, increasing satisfaction and reducing complaints. The impact of this strategy distills down to the initial vision statement of the HCCDIS: **"Services you expect, when and where you want them, delivered by technology, data and people".**

The HCCDIS also proposed significant commitments towards the development of a service inventory and process review and redevelopment which will support more efficient delivery of services. These processes will leverage expertise in internal service divisions, including ITS, OPS, and CEC, in additional to external partnerships with community organization and external experts to ensure we are delivering the services expected of us as effectively as possible while streamlining the costs of delivery.

Report Impacts:

Agreement: No

By-law: No

Budget Amendment: No

Policy: No

Attachments:

1. Haldimand County Corporate Digital Innovation Strategy