# Town of Newmarket

Draft Digital Transformation Strategy

October 18th, 2021

CREATING CONDITIONS FOR SUCCESS

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# 1

## Executive Summary – Strategy Synthesis

# Digital transformation is a strategic rethinking of how an organization uses technology, people, and processes to achieve its goals

**The Town of Newmarket's digital transformation strategy synthesizes the Town's overarching digital goals and objectives and provides a blueprint for how an organization will act on identified opportunities and organize its people, processes, and technology to do so.**

## High-Level Approach

StrategyCorp worked closely with the Town's operational and senior leadership teams ("OLT" and "SLT") to develop a Digital Transformation Strategy that was founded in a wholistic view of the current-state, informed by extensive stakeholder consultation.

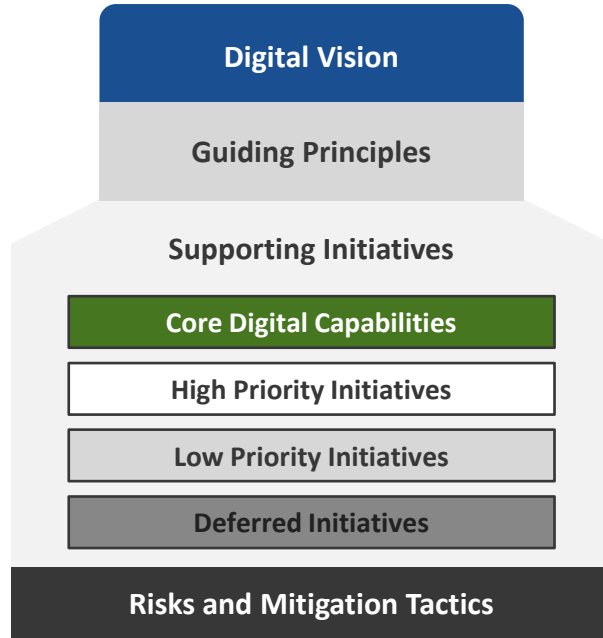**Stakeholder Consultations** ▶ **Strategic Visioning** ▶ **Initiative Prioritization** ▶ **Operationalization Planning**

**Operationalization planning is still underway and StrategyCorp is working collaboratively with OLT, SLT, and relevant departmental staff to begin scoping and sequencing priority initiatives as part of the strategy; operationalization will be included in the final report.**

# Newmarket's Digital Transformation follows a framework focused on achieving the central vision through execution of a series of priority digital initiatives

## Newmarket's Digital Transformation Strategy Framework

**Digital Vision**

**Guiding Principles**

**Supporting Initiatives**

**Core Digital Capabilities**

**High Priority Initiatives**

**Low Priority Initiatives**

**Deferred Initiatives**

**Risks and Mitigation Tactics**

The Digital Transformation Strategy is guided by an overall **Vision** for Newmarket's digital future. This vision outlines how the Town will transform its operations, services, and relationships to create a digital future-state.

Additionally, several **Guiding Principles** help establish how the Town will implement the strategy, and what concepts should help guide its development.

In order to achieve the established vision, the Digital Transformation Strategy sets out a variety of **Supporting Initiatives,** which the Town should plan for and undertake to reach its digital objectives.

These initiatives were identified from a variety of sources, including stakeholder consultation and municipal best-practices, and are prioritized to help guide sequencing.

Finally, several key **risks** for execution of the Digital Transformation Strategy, as well as **mitigating tactics**, were identified and included.

# Newmarket's Digital Transformation Strategy is guided by a clear digital vision – articulated through five elements – as well as a set of guiding principles

## Digital Vision Elements

Improve residents' ability to easily and digitally interact with town services on their terms.

Make it as easy as possible to access information and data related to the Town.

Create broader, deeper, and more meaningful collaboration and engagement within the Town, with the public, and with other partners.

Internally automate, digitize, and revitalize processes and information to reduce duplication and enhance outcomes.

Enable the future of work through processes, technology, policies, and a progressive culture.

## Digital Guiding Principles

The DTS needs to be viewed as an ongoing opportunity to reinvent the future, not a one-time check the box exercise.

Initiatives should be grounded, practical, achievable, and carefully consider how much customization is necessary.

The DTS is about more than just technology, and should target how processes and people are structured to support the Town.

Opportunities need to be clearly prioritized and resourced based on a common set of criteria.

The DTS must establish clear governance and performance-based accountability, in order to achieve success.

All Town initiatives should consider digital implications and opportunities, not just those in the DTS.

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# To support vision execution, several initiatives have been proposed and prioritized for consideration under the Digital Transformation Strategy; sequencing is underway

## Initiative Priorities and Groupings

| Core Capabilities | High Priority Initiatives | Lower Priority Initiatives | Deferred Initiatives |
|---|---|---|---|
| **Initiative** | **Initiative** | **Initiative** | **Initiative** |
| Revitalize File Management Systems / Processes | Digitize and Operationalize Planning / Building Applications (Accela) | Review and Digitize Current Finance Processes | Improve Digitization and Automation of Building Inspections |
| Introduce an Overall Data Management Strategy | Review and Standardize Communications Platforms for the Town | | Explore Internet of Things and Automation Applications for the Town |
| Design and Implement a Digital Governance Framework | Digitize Recreational Facility Bookings (Catch Corner) | Introduce a Digital Collaboration Communications Platform / Mainframe | |
| Realign Procurement Processes to Enable Digital Transformation | Introduce a Resident Self-Service Portal to Centralize Interactions with the Town | | Refresh the Town's Intranet |
| Introduce a Back-End Integration Platform / Standards for Integration | Implement a Comprehensive Public Works Management / Computerized Maintenance Management System | Introduce a Mobile Experience for the Town | |
| Design and Implement a Sustainable Approach to User Training | Establish Future of Work Model | | Assess Status of the Library Website |
| Digitize Newmarket's Common By-Law Requests, Services, and Forms | Replace the Newmarket Website | | |
| Create an Inventory of Current Solutions and Ensure Cross-Departmental Awareness | Implement a Robust HRIS System | Implement a New, Integrated Building Automation System | Improve Internet Access in Public Spaces |
| Improve the Town's Overall Cybersecurity Posture | Replace the Outdated Parks and Rec. Management Software | | |

*Draft groupings do not necessarily dictate how initiatives should be sequenced; sequencing is under development through implementation planning.*

# Several potential risks and barriers to execution were identified for the Digital Transformation Strategy, along with potential mitigating actions

| Risks and Barriers | | | |
|---|---|---|---|
| **Staff Adoption and Culture** | **Allocation and Prioritization of Resources** | **Accessibility and Support** | **Communication and Outcome Management** |
| Some staff may be reluctant to adopt new technologies and / or processes or prefer the methods they are used to. Without strong leadership, accountability, and 'deconstruction' of old processes, staff may undermine change. | Resources need to be adequately allocated to ensure that the transformation is successful. Not only financial investments will be required, but staff time will also need to be carved out for adopting new tools, processes, and technologies. | Not all staff and residents may be able to access new services, tools, and technologies. This could be the result of dated hardware, limited connectivity, or low digital literacy. If the Town doesn't include training, and other supports for as part of the strategy some may be left behind. | Objectives and desired outcomes must be actively communicated to all relevant stakeholder so that they are aware of expectations. KPIs need to be identified to track success and progress should be publicly reported build accountability and transparency. |

**Mitigations**

| | | | |
|---|---|---|---|
| Executive Sponsorship/ Council, SLT, OLT Leadership | Consistent and Transparent Prioritization and Resource Allocation Approaches Enshrined in the Digital Governance Model | Comprehensive Staff Training Program | Clearly Established KPIs / Expectations |
| "No Going Back" Culture of Implementation | | Assigned Staff Capacity / Time for Training | Consistent Monitoring and Reporting |

# 2

## Digital Transformation Strategy

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# What is digital transformation?

**Digital transformation** is a strategic rethinking of how an organization uses technology, people, and processes to achieve its goals. Digital transformation assesses current state strengths and weaknesses, and identifies opportunities to improve the status quo.
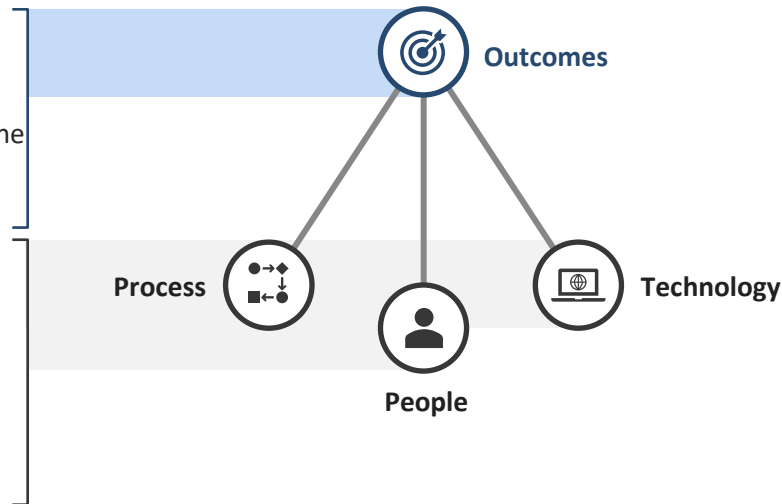
Digital transformation should be **outcome-led**, and should aim to fix organizational issues, enable improvements, or create efficiencies.

**Not all opportunities need to be sweeping, or increase integration**; often, the best improvements come from a variety of smaller scale changes that are tailored to the organization's context.

Opportunities should have a **solid foundation in current capabilities** across process, people, and technology.

**Digital transformation is not all about new software, or technology; often, process changes or staff supports are more effective transformation tools.** If people lack the right mindset to change and the current processes are flawed, new technology will often only magnify the current issues.

Outcomes

Process

Technology

People

The Town of Newmarket's **digital transformation strategy** synthesizes the Town's overarching digital goals and objectives and provides a blueprint for how an organization will act on identified opportunities and organize its people, processes, and technology to do so.

# This Digital Transformation Strategy was iteratively developed over of multiple phases of work, with comprehensive and wide-reaching stakeholder consultation

StrategyCorp worked closely with the Town's operational and senior leadership teams ("OLT" and "SLT) to develop a Digital Transformation Strategy that was founded in a wholistic view of the current-state, informed by extensive stakeholder consultation.

## High-Level Approach

### Stakeholder Consultations

A comprehensive digital current-state assessment was performed, and Council, SLT, OLT, staff, and residents were consulted to build an understanding of what the Town's current capabilities are, and what opportunities for improvement exist.

### Strategic Visioning

Based on current-state findings, a digital transformation vision was established, as well as guiding principles for execution and potential risks / barriers to success; these elements were iteratively formed and guide the strategy.

### Initiative Prioritization

A list of digital transformation initiatives was created based on consultations, best-practices, and current-state gaps, and subsequently prioritized to form the basis for the strategy's execution.

### Operationalization Planning

An operationalization plan for the strategy is being developed to help sequence, plan, and scope key initiatives, as well as identify interdependencies and areas where alignment needs to be established.

Operationalization planning is still underway and StrategyCorp is working collaboratively with OLT, SLT, and relevant departmental staff to begin scoping and sequencing priority initiatives as part of the strategy; operationalization will be included in the final report.

# Newmarket's Digital Vision

**The Digital Vision presented below – across five elements – sets the goal Newmarket's digital transformation and its desired future state; decisions made and priorities established under the strategy should align with and enable this vision.**

<u>**Newmarket's Digital Vision Elements**</u>:

**Improve residents' ability to easily and digitally interact with town services on their terms.**

**Make it as easy as possible to access information and data related to the Town.**

**Create broader, deeper, and more meaningful collaboration and engagement within the Town, with the public, and with other partners.**

**Internally automate, digitize, and revitalize processes and information to reduce duplication and enhance outcomes.**

**Enable the future of work through processes, technology, policies, and a progressive culture.**

# Newmarket's Digital Guiding Principles

In addition to the Vision elements, the six guiding principles captured below were developed to help define how Newmarket should proceed with its digital transformation, and what it should keep in mind as it does so.

**Newmarket's Digital Guiding Principles**:

The Digital Transformation Strategy needs to be viewed as an ongoing opportunity to reinvent the future, not a one-time check the box exercise.

Initiatives should be grounded, practical, achievable, and carefully consider how much customization is necessary.

The Digital Transformation Strategy is about more than just technology, and should target how processes and people are structured to support the Town.

Opportunities need to be clearly prioritized and resourced based on a common set of criteria.
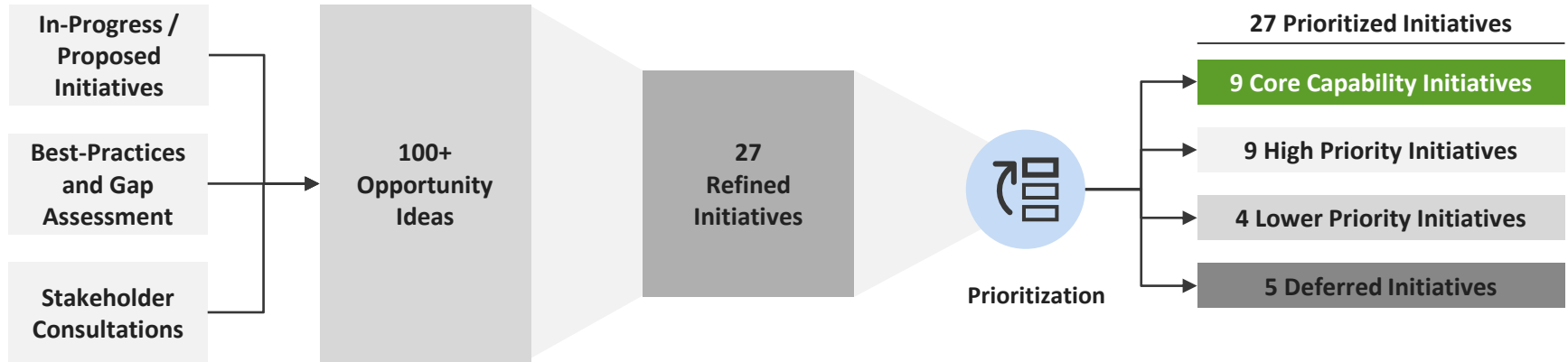
The DTS must establish clear governance and performance-based accountability, in order to achieve success.

All Town initiatives should consider digital implications and opportunities, not just those in the DTS.

# 27 initiatives were identified and prioritized for consideration within the overall Digital Transformation Strategy, falling into four priority buckets

## Initiative Framework Development Approach

**In-Progress / Proposed Initiatives**

**Best-Practices and Gap Assessment**

**Stakeholder Consultations**

**100+ Opportunity Ideas**

**27 Refined Initiatives**

**Prioritization**

**27 Prioritized Initiatives**

**9 Core Capability Initiatives**

**9 High Priority Initiatives**

**4 Lower Priority Initiatives**

**5 Deferred Initiatives**

A long-list of potential opportunity ideas for the Town to pursue as part of the Digital Transformation Strategy was assembled based on inputs from a variety of sources, resulting in over 100 ideas for improvements, changes, or new solutions.

Identified ideas were combined and refined into distinct initiatives with a unique problem statement and solution.[1]

Initiatives were scored and prioritized against a set of criteria to identify higher and lower priority initiatives.

Based on priority scorings – as well as initiative outcomes and characteristics – initiatives were assembled into four groups for consideration as part of the Digital Transformation Strategy.

Notes: [1] Many ideas referred to common or complementary problem statements, or were sub-components of other initiatives, and warranted being combined into one, cohesive initiative.

# Key Considerations on Initiative Prioritization

**While initiative priority groupings provide a lens through which to view the Digital Transformation Strategy and its constituent initiatives, additional elements must be considered to arrive at a finalized operationalization plan for the strategy.**

**While draft initiative priorities have been established, initiatives must still undergo operationalization planning, and elements such as sequencing, cost, and risk must be considered to establish a complete view of the strategic plan.**

**Priorities represent a draft prioritization of key initiative outcomes, and may evolve, shift, or merge as operationalization plans are developed, and elements of the strategy are finalized.**

**Initiative priorities do not necessarily reflect exactly how initiatives will be executed or sequenced (e.g., high priority initiatives will not necessarily occur before low priority initiatives, etc.); in order to determine sequencing, factors such as cost, interdependencies, and other potential areas of alignment or interaction between initiatives must be considered.**

**Many initiatives will be broken into sub-components and phases for operationalization, as a result immediate progress may be made on initiatives that are not planned to be completed in the short-term (i.e., scoping and planning activities will often occur first, and depending on outcomes may impact later phases of the initiative).**

# Initiative Prioritization Framework – Core Capabilities

## Core Capabilities

Initiatives that establish capabilities, processes, or technologies that are foundational to the digital transformation strategy, and heavily support the implementation of other initiatives.

| | | |
|---|---|---|
| Revitalize File Management Systems / Processes | Introduce an Overall Data Management Strategy | Design and Implement a Digital Governance Framework |
| Design and Implement a Sustainable Approach to User Training | Digitize Newmarket's Common By-Law Requests, Services, and Forms | Create an Inventory of Current Solutions and Ensure Cross-Departmental Awareness |
| Introduce a Back-End Integration Platform / Standards for Integration | Realign Procurement Processes to Enable Digital Transformation | Improve the Town's Overall Cybersecurity Posture |

**High Priority Initiatives**

**Lower Priority Initiatives**

**Deferred Initiatives**

# Initiative Prioritization Framework – High Priority Initiatives

| Core Capabilities |
|---|

**High Priority Initiatives**

Initiatives with a high overall score, generally aligned with progression of the Town's key digital objectives; these initiatives should take precedence for consideration.

| | | |
|---|---|---|
| Establish a Cohesive Digital Resident Communications Strategy | Introduce a Resident Self-Service Portal to Centralize Interactions | Implement a Robust HRIS System |
| Establish Future of Work Model | Replace the Newmarket Website | Replace the Outdated Parks and Rec. Management Software |
| Complete Digitization and Operationalization of Planning / Building Applications (Accela) | Complete Digitization of Recreational Facility Bookings (Catch Corner) | Implement a Comprehensive Public Works Management / Computerized Maintenance Management System |

| Lower Priority Initiatives |
|---|

| Deferred Initiatives |
|---|

# Initiative Prioritization Framework – Lower Priority Initiatives

| Core Capabilities |
|---|

| High Priority Initiatives |
|---|

**Lower Priority Initiatives**

Initiatives with a lower overall score than high priority initiatives, yet likely worthwhile pursuing in the future; these initiatives should be planned for and assessed as the strategy progresses.

| Review and Digitize Current Finance Processes | Introduce a Mobile Experience for the Town | Introduce a Digital Collaboration Platform / Mainframe |
|---|---|---|

| Implement a New, Integrated Building Automation System | | |
|---|---|---|

| Deferred Initiatives |
|---|

# Initiative Prioritization Framework – Deferred Initiatives

| Core Capabilities |
| --- |
| High Priority Initiatives |
| Lower Priority Initiatives |

**Deferred Initiatives**

Low scoring initiatives that likely do not fit within the digital transformation strategy, or should be deferred until further progress is made on high-priority initiatives; these initiatives should be reviewed in the future.

Explore Internet of Things and Automation Applications for the Town

Refresh the Town's Intranet

Improve Digitization and Automation of Building Inspections

Assess Status of the Library Website

Expand Internet Access in Public Spaces

# Several potential risks and barriers to execution were identified for the Digital Transformation Strategy, largely focused on adoption, communication, and governance

## Risks and Barriers

Several themes regarding potential risks and barriers to digital transformation were identified over the course of engagement, including …

### Staff Adoption and Culture

Some staff may be reluctant to adopt new technologies and / or processes or prefer the methods they are used to. Without strong leadership, accountability, and 'deconstruction' of older processes, staff may undermine change.

### Allocation and Prioritization of Resources

Resources will need to be adequately allocated to ensure that the Digital Transformation is successful. Not only financial investments will be required, but staff time will also need to be carved out for learning new tools, processes, and technologies.

### Accessibility and Support

Not all staff and residents may readily be able to access new digital services, tools, and technologies. This could be the result of poor hardware, limited connectivity / internet access, or poor digital literacy. If the Town doesn't include training, and other supports for staff and residents as part of the strategy some people may be left behind.

### Communication and Outcome Management

For successful execution and adoption, objectives and desired outcomes must be actively communicated to all relevant stakeholder so that they are aware of and educated on expectations. KPIs need to be identified to track success and progress should be regularly reported on publicly to build accountability and transparency.

# 3

# Supporting Materials Overview

# A wide range of supporting analysis not included in this draft report has been prepared as a foundation to the Digital Transformation Strategy

**Methodologies**
Further detail on the best-practices, approaches, and other methodologies used to construct the Digital Transformation Strategy.

**Consultation Findings**
Detailed findings from consultations (i.e., interviews and surveys) with SLT, OLT, staff, residents, and Council, including a gap assessment against leading digital practices.

**Supporting Materials**

**Initiative Long-List**
The long-list of digital initiatives considered under the study, including problem statements, opportunity statements, and sub-initiatives where applicable.

**Prioritization Criteria and Approach**
An overview of how initiatives were prioritized, and what criteria and scales were used to determine and score prioritization.

**All relevant supporting materials will be contained in the final report submitted to council.**

# 4

## Next Steps

# Next Steps

Draft findings to be refined / adjusted based on Council feedback.

Initiatives will be further defined and characterized; operationalization plans will be developed for select priority initiatives and an overall operationalization framework will be developed.

The complete strategy will be finalized and reviewed with SLT, including operationalization details.

The final strategy will be shared with Council for review and feedback (Nov. 15th).

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