



SUBJECT: Business intelligence and Vision to Focus integrated reporting

TO: Corporate Services, Strategy, Risk & Accountability Cttee.

FROM: City Manager's Office

Report Number: CM-02-20

Wards Affected: all

File Numbers: 155-03-01

Date to Committee: May 14, 2020

Date to Council: May 25, 2020

Recommendation:

Receive and file city manager's office report CM-02-20 providing the introduction of the Vision to Focus (V2F) integrated reporting tool as depicted in sample screens shots contained in Appendix A.

PURPOSE

Vision to Focus Alignment:

- Building more citizen engagement, community health and culture
- Deliver customer centric services with a focus on efficiency and technology transformation

Background and Discussion:

2018 – 2022 Burlington's Plan: From Vision to Focus

2018 to 2022 Burlington's Plan: From Vision to Focus (V2F) was also unanimously approved by Council on July 15, 2019 (CM-15-19). This is the City's work plan that prioritizes key strategic directions from Burlington's long-term 25-year Strategic Plan and details key goals and strategic actions required to move these priorities forward during the term of this Council. This plan takes into consideration the wide range of programs and 39 City Services delivered to the community and the commitment both

Council and administration have in delivering trusted, effective and efficient services to everyone.

V2F is divided into 5 focus areas which are aligned to the 25-year Strategic Plan and the delivery of city services to the community.

Focus Area 1 - Increasing Economic Prosperity and Community Responsive Growth Management

Focus Area 2 - Improving Integrated City Mobility

Focus Area 3 - Supporting Sustainable Infrastructure and a Resilient Environment

Focus Area 4 - Building More Citizen Engagement, Community Health and Culture

Focus Area 5 - Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation

In November 2019, Council received the 2018-2022 Burlington's Plan Vision to Focus Financial Plan (F-41-19). This plan assists in ensuring initiatives are aligned with the annual budget, and that business cases are directly supportive of strategic priorities.

City of Burlington Proposed High-Level Corporate Strategy Workplan was endorsed by Corporate Services, Strategy, Risk & Accountability Committee on March 12, 2020 (CM-08-20). This workplan included the introduction of the V2F Integrated Reporting in May 2020 to establish accountability through regular reporting on progress to meeting key performance indicators and key target dates.

Business Intelligence (BI)

Business Intelligence enables services, streamlines operations, generates insights and fuels continual process improvements, by improving access to high quality data for ongoing analysis. This includes presenting current and historical data in dynamic dashboards that are readily available, easy to use and create.

The City's Business Intelligence program was formally established in 2017 and its mission is reflected as a key theme in the City's Corporate IT Strategic Plan. This theme describes the need to treat information as an asset and envisions a future where the City becomes more of a data and evidence driven organization, using analytics to improve the lives of residents and enhance the efficiency of the City's operations.

The BI program originated as one of the findings from an enterprise-systems review completed by Deloitte in 2013, which recommended "improving Information

Management with focused investment on middleware (integration), data warehousing and reporting tools."

Business Intelligence is now accomplishing the following goals:

- Implementing enterprise-wide BI technology from Information Builders
- Developing skills and sharing knowledge
- Building a data-driven culture and community of practice
- Completing a Master Data Management roadmap
- Developing data-driven dashboards
- Assessing data quality

The Business Intelligence team consists of four contract positions and reports directly to the Chief Information Officer. The program is funded by capital order (CA0057) and currently set to close in December 2020.

Strategy/process

Why monitoring and reporting matter?

Goals, strategies, objectives and activities are all achievable; some over longer time periods than others. What each has in common is the need to monitor and track to see how progress is made in achieving the stated goal or objective and completing the activities. In V2F, Burlington City Council made a commitment:

"We will share regular updates on the implementation and progress of the plan with the citizens of Burlington. We will let our community know our achievements and progress on the 2018 to 2022 Burlington Plan: From Vision to Focus that helps realize our long-term vision for the City of Burlington." V2F, page 3.

Monitoring and reporting matter because of accountability. City of Burlington management and staff are accountable to City Council. City of Burlington council is accountable to the citizens of Burlington.

What is it?

V2F integrated reporting is the combination of qualitative information and quantitative data in a way that supports:

- Telling the story by communicating our successes and progress to the public,
- A consistent and standardized corporate-wide approach to strategic tracking and reporting, and
- Linking levels of corporate performance from the high-level strategy to service-level operations.

Who is it for and when will they have access to it?

The V2F integrated reporting is for a wide range of audiences.

- Management and staff use it track their progress against the workplans and allocate resources to drive results.
 - Access will be available to management effective June 2020.
- Council use it to see the status of the initiatives they have identified as priority and the progress towards the objectives and goals.
 - Access will be available to Council effective June 2020.
- Citizens of Burlington use it to see the work that is in progress and has been completed to advance the community closer to the 25-year vision.
 - Access will be available to the public in the fall of 2020. This timeline provides the time to ensure the necessary information security measures are in place.

What is being reported?

V2F Integrated Reporting includes initiatives and measures from each of the 5 focus areas as identified in the “Top Priorities” section of the 2018 – 2022 Burlington’s Plan From Vision to Focus (updated version September 2019 - pages 10 and 11). Attention has been given to those initiatives with associated target completion dates contained in Appendix A – Action Plan at a Glance (pages 27 and 28).

Information provided includes:

- Strategic goal summary
- Initiative status updates
- Key performance indicators, and
- Completed initiatives

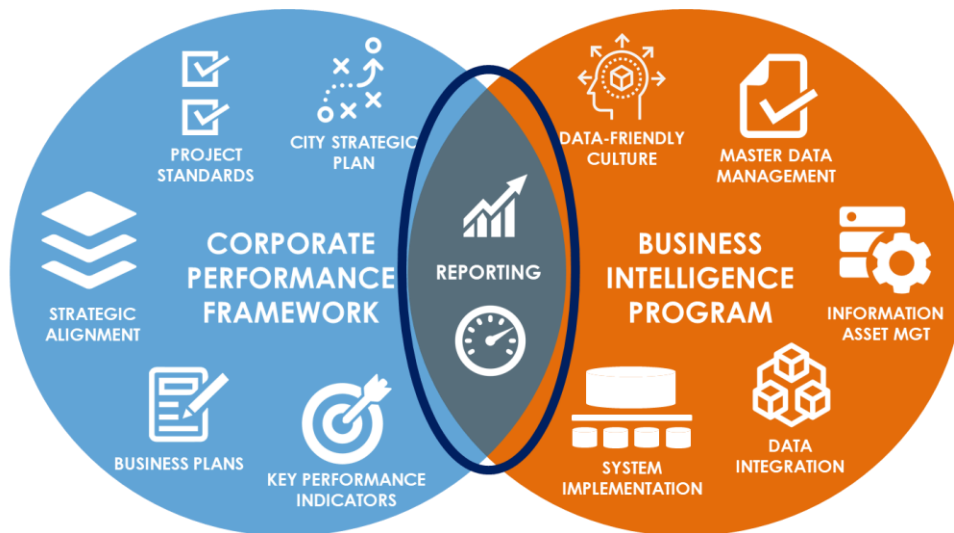
There is a placeholder for risk details to be identified through the implementation of a risk governance framework. The expected timeline for the risk information is December 2020.

How often will V2F information be updated?

Updates to the qualitative information (e.g. status of the initiatives, progress, etc.) will be quarterly. Data-driven measures are updated in real-time based on the frequency parameters defined at the time the measure was designed.

How we did it?

The natural partnership of our Business Intelligence team with service leads and subject matter experts, and use of the City’s business intelligence technology, has led to the development and implementation of the V2F Integrated Reporting Tool.



The Business Intelligence program charter also includes a goal to “collaborate with the City Manager’s Office on developing a citizen dashboard and/or public portal to view KPI measures.”

What is unique about the City of Burlington’s integrated reporting is the use of live data to construct key performance measures resulting in data-driven measures. These measures are made possible through:

- the view that business intelligence is an activity, discipline, process and strategy
- the technical capabilities of iWay and WebFOCUS technology to connect with, translate and display live data in a single integrated platform
- the skills available among members of the Business Intelligence team
- the active participation of service-based Subject Matter Experts
- the willingness of organizational leaders to share data on service performance
- the creation of links to many of the City’s source systems, and
- the involvement and collaboration of subject matter experts, data modelers, data integration specialists, and business intelligence specialists.

Financial Matters:

The development of the V2F Integrated Reporting tool was completed within the corporate project funding for the Business Intelligence program.

Climate Implications

Not applicable.

Engagement Matters:

Inclusive in the overall project plan for V2F Integrated Reporting is ongoing communications and engagement. The initial phase of the project included awareness and knowledge building through presentations and training about Service Key Performance Indicators, Business Intelligence and the V2F Plan to City Leadership, Service Leads and Management. Further consulting has occurred through one on one meetings with Council and Burlington Leaders and a recent presentation on April 22nd to the Burlington Leadership Team to achieve the current design and data. There will be internal staff communication, further Councilor and staff training and change management practices implemented as part of the initial launch of the V2F Integrated Reporting platform. Leading up to the public launch, an external communications plan will be executed to inform the public.

Conclusion:

V2F integrated reporting (version 1.0) utilizes data-driven measures, in conjunction with qualitative updates, to monitor and report on the City's progress in achieving Vision to Focus goals. This tool supports our commitment to share regular updates on the implementation and progress of the plan with Burlington City Council and citizens. It also showcases the return on investment made with the implementation of business intelligence strategy, tools and processes.

Respectfully submitted,

Sheila M. Jones, CIA, CFE, CRMA
Executive Director, Strategy, Risk
& Accountability
905-335-7600 ext. 7872

Clare Cameron
Program Manager, Business
Intelligence
905-335-7600 ext. 7356

Appendices:

- A. CM-02-20 Appendix A: V2F Integrated Reporting sample screen shots

Report Approval:

All reports are reviewed and/or approved by Department Director, the Chief Financial Officer and the Executive Director of Legal Services & Corporation Council. Final approval is by the City Manager.