



# MISA Ontario Strategic Plan 2020-2023

In Support of Digital Transformation

April 2020

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## Executive Summary

Change is the only constant in the world, and this cannot be truer than in the technology domain. In municipal government, technology, innovation and digital continue to rapidly grow in their importance and profile. Increasingly, to be effective at evaluating, implementing and leveraging technology, is the hallmark of a high-functioning municipality.

This is the context in which MISA Ontario operates, and in which it must evolve and change in its quest to stay relevant and valuable to its membership.

Over the past decade, MISA Ontario has undergone its own transformation; from a purely volunteer-run organization into an organization that is volunteer-led and professionally managed and operated. Making this change was a significant leap for the Association, and at the time there were many uncertainties and concerns about the viability of this approach.

Looking back, the change has been a marked success. The Association is on a stronger footing than ever before, with financial sustainability, effective operations, and a broader set of offerings and services that are of a consistently high quality.

Now, MISA Ontario has reached another inflection point. It is time for the Association to take another leap – this time in establishing a stronger profile and leadership role across the industry, with other levels of government and within municipalities.

We plan that all of the existing great features of the Association in service to our membership – our events and webinars, our networking, communities and projects – will to continue to evolve and improve.

But with this strategy, MISA Ontario intends to step up and become a trusted, respected authority around technology, digital and innovation in municipalities.

This means becoming an active and vocal thought leader on what it takes to be successful in these spheres; it means being an advocate for the technology, digital and innovation communities to other levels of government; it means outreach on behalf of our members to Councillors and Executives, clerks and treasurers, and purchasing specialists among others that are so central to technology success; and it means providing advice, guidance, resources and educational support to IT leaders and IT teams to help them step up to the new challenge.

This is an exciting time to be involved in technology, digital and innovation work in municipalities – with this strategy for digital transformation, MISA Ontario is taking the next step in supporting its membership and helping to accelerate the municipal community's ability to transform government service delivery through technology and people.

# 1. Introduction and Context

## 1.1 About MISA Ontario

MISA Ontario (Municipal Information Systems Association, Ontario) is a non-profit organization whose objective is to foster an engaged and active community of municipal professionals, at all levels, to share information, experiences and promote good municipal IT practices. MISA Ontario strives to be an advocate for technology and innovation on behalf of all municipalities, small to large, on issues and topics that impact their communities.

The Association was formally established in 1971 and has served municipal members through the facilitation of information sharing and networking

The Association's services are built around three core areas:

### Networks and Communities

MISA Ontario connects members and builds communities of the brightest and most progressive minds in municipal technology who willingly share ideas and experiences.

### Events and Professional Development

MISA Ontario hosts premier events that educate and develop municipal IT professionals and showcase innovation and best practices.

### Shared Knowledge

MISA Ontario identifies and shares municipal best practices and provides tools and resources that save municipal IT leaders and staff time.

MISA Ontario has continued to grow over the years and has advanced in many ways that has helped to serve its members well.

Membership surveys indicate that MISA Ontario is highly regarded and credited by its members with providing value and support. It should be proud of the accomplishments made to date.

## 1.2 The Context

Today, the reach of technology has expanded beyond all our expectations – digitization, innovation, digital services, analytics, smart city, organizational and service transformation – all are influencing and impacting municipalities.

Customer expectations of municipal service delivery are now compared to the likes of Amazon, Google and Netflix, and to ServiceOntario and the CRA.

Data and Analytics are starting to have a big impact – informing resourcing, planning and service delivery. Artificial intelligence (AI) and Voice Assistants are emerging with the potential to revolutionize customer service. Connected devices and sensors that

drive the Internet of Things (IoT) are allowing municipalities to monitor, adjust and automate programs such as traffic and water flows, noise, air quality, and event attendance, just to name just a few.

Augmented and Virtual Reality (AR and VR) are introducing a new paradigm for visualizing proposed developments, parks and buildings, training and development, and a new way for customers to engage with municipal plans and proposals.

And these are just a few of the current examples – there are nearly limitless opportunities to embrace emerging technologies ahead – while at the same time municipalities and technology teams must maintain legacy systems and evolve the “solid state” of technology management.

The emergence of new technology capabilities has broadened the tent of those involved in applying technology to service improvement within municipalities – far beyond the traditional IT roles that we have seen in municipalities. The growth of innovation programs, continuous improvement, and smart city task forces, points to the need for new approaches and new partnerships within and across organizations to successfully take advantage of these opportunities.

Finally, the pace of change is only accelerating. Recent events around Covid-19 have served to both highlight the importance and dependence upon technology, while also demonstrating a new pace of change – perhaps the proving ground for new approaches and expectations to come.

So, it is clear that the landscape is radically and rapidly changing and municipalities – their Councils, Executives, technology and operational staff – are left with the challenging task of navigating all of this.

### 1.3. The Process

So, given all of this change and upheaval, what can the Association do to help its membership better navigate these times and these opportunities? This was the question on our minds as we developed this strategy.

The methodology used for the development of the strategy emphasized collaboration and engagement – with membership, the Board and others party to the Association. This strategy is informed by a range of inputs including: a detailed background document review, a digital Town Hall and online ideation sessions with membership, online surveys, interviews with the current and past Board members and staff as well as several onsite workshops with the Board. These interactions have led to many insights, fresh ideas and the strategic directions that you see articulated in this strategy.

## 2. What MISA Ontario Can Be

### 2.1 A Crossroads

As we have noted, over the past decade MISA Ontario has achieved a lot. The Association has transitioned from a volunteer organization to a professionally run organization, with a broad slate of in-person and digital events. Membership, event attendance, and engagement have all grown significantly over this period and member satisfaction is high.

Against the 2015 strategy, the majority of strategic goals set out to be achieved have been completed. So, now the Association finds itself at a crossroads – does it hunker down and continue to do what it does well – events, networking and knowledge sharing – or is now the time to build on past successes, branch out and begin to take a stronger leadership role as well.

As technology in municipalities faces unprecedented pressures and change, we strongly believe now is the time for MISA Ontario to step up and help lead the way – help the industry, our member municipalities and teams respond to the new opportunities, to evolve and grow.

### 2.2 Future Aims

In developing this strategy, through broad consultation with our membership and Board, we have confirmed that MISA Ontario should:

#### **Aim to:**

- Support better use of technology by municipalities in Ontario
- Facilitate and build relationships among Ontario municipalities so we can share information and best practices and collectively improve our municipalities by working together – a place to collaborate
- Provide timely, relevant, expert information to its membership
- Be the voice of Ontario's municipal IT sector at other levels of government and with other organizations
- Identify appropriate standards and good practices given municipal context for IT operations, both day-to-day and as needs arise (e.g., security breaches)
- Advocate for, provide guidance to, and connect municipalities regarding important IT issues
- Lead municipalities through the complex nature that is IT and business transformation
- Ensure value for members and long-term financial stability for the organization

#### **By:**

- Creating connections and communities (online and offline) – social media, discussion forums, meetups, communities of practice
- Hosting events – conferences, webinars, panels

- Sharing (RFPs, job descriptions, standards, best practices, experiences, what people are working on) and leveraging the expertise of the membership and Partners and spreading it to the rest of the membership
- Providing thought leadership – selecting and publishing good practices
- Speaking / Presenting / Writing / Podcasting outside of the IT community to promote key messages that will be helpful to MISA Ontario community members
- Advocating on behalf of all members on topics and issues that affect us all
- Providing education (facilitating technical and non-technical training) and promoting learning and education
- Finding ways to create shared value for the membership, whether through cooperative procurement, group rates, preferred partners (vendors), etc.

## 2.3 The Elevator Pitch

So, what is the elevator pitch for MISA Ontario?

**We are a community of experts and practitioners that provides leadership, guidance, and resources for anyone interested in using technology to make municipal services better.**

Why would people join MISA Ontario?

**Organizations join MISA Ontario if they want their staff to share and learn from peers and leaders in municipal technology and innovation.**

**People join MISA Ontario to participate in a community that actively shares ideas and solutions to common municipal technology challenges and opportunities.**

If this is what we want the Association to be and these are the services that we want to offer, what actions do we need to take to get us there?

## 3. Vision and Objectives

### 3.1 A New Vision

First, we set our vision and key objectives.

As part of the 2015-2019 Strategic Plan, MISA Ontario introduced a vision statement – *Promoting Excellence in Municipal Information and Communications Technology*.

At that time, this vision encapsulated the Association’s overall mission to share and promote excellence in IT. Following the path to a bolder future, now is the time for change. As a result of the more expansive intent of the Association going forward, we introduce a new vision, and supporting objectives.

**Connecting and empowering Ontario municipal professionals to collectively transform government service delivery through technology and people.**

### 3.2 Our Objectives

The objectives developed in 2015 largely remain relevant, but have been slightly updated to be fully supportive of the new vision:

- To build an engaged and active community for all IT professionals working in and with municipal government to share information, skills and experiences
- To identify, develop and share municipal IT standards and best practices
- To be the respected voice of municipal information technology professionals in Ontario
- To advocate on behalf of all municipalities on digital and technology challenges that impact all members
- To foster partnership and collaboration among all stakeholders who are interested in applying technology and digital to municipal services, including engaging with those who do not work directly within the IT teams and IT sector
- To promote strategic alliances between member organizations and between the public and private sectors
- To enable service providers to deliver more effective services to municipalities through education, research and information sharing

## 4. Key Actions

Next, we set out the key actions that will help us achieve our aims and objectives.

There were a number of actions identified as a result of our consultation with members and the Board, however, to start the transformation to the *new* MISA Ontario, the first two key actions need to be the primary focus. Each are significant shifts, and if done right will establish a major change in the profile and value, effectiveness and attractiveness of the Association.

### 4.1 Build MISA Ontario's Profile and Influence (Thought Leadership)

Membership wants the Association to have a stronger voice, to advocate and lobby, to promote technology and innovation across the municipal sector with other levels of government, and act as a change agent with Councils, CAOs and municipal leaders. The hope and intent is for MISA Ontario to become a recognized authority that holds weight with Councils and municipal leaders throughout Ontario.

To grow the profile and influence of MISA Ontario, the Association must actively seek and take on opportunities to position itself as an authority on technology and digital transformation in the municipal sector.

There are two bases to target – the broader community of municipal professionals and leaders, and existing MISA members.

Thought leadership through writing, social media, speaking engagements, panel discussions, webinars, sponsorships, and delegations are all methods that the Association can use to build this profile with existing membership and beyond.

Reaching beyond its existing membership base, MISA Ontario should focus on communicating with Ontario-specific municipal associations and organizations which, in turn, should be aligned with the Association's marketing plan. Coordination with MISA Canada would be advisable for events with a more national focus.

Specific organizations for the Association to target are: Association of Municipalities of Ontario, Association of Municipal Clerks and Treasurers of Ontario, Ontario Public Buyers Association, Ontario Municipal Human Resources Association, Municipal Finance Officers Association of Ontario, Ontario Professional Planners Institute. Although a focus should be placed on government-specific conferences, profile at industry-specific/agnostic conferences may also help to establish a broader outreach.

With respect to existing members, thought leadership should extend to collaborating to share and promote good practices in existence, building and leading communities, signposting and editorializing to identify standards to which the membership should be striving.

## 4.2 Establish a Technology Voice for MISA Ontario

If MISA Ontario is to take on this role as a thought leader, there is a need for an *evangelist* and *spokesperson* for the Association – someone who can consistently represent the voice of MISA Ontario in relation to best practices and positions on emergent issues.

Such a role would internally help identify topics and content, and help build communities that will connect and engage membership. They would stimulate and encourage important technology, policy and people conversations with the membership. This role would also help develop and curate content in response to common and emerging municipal IT issues/trends. Outwardly, the role would advocate, and use their position to promote the importance of technology, innovation and digital in the municipal sector.

It is important that this person have strong IT executive experience, as the foundation to understand the technology concepts behind technology leadership in municipalities. The role will also require engagement, communication, community and leadership skills that will allow him/her to work as an ambassador and as an active and authoritative voice within the membership and broader municipal community.

The Association has professionalized the administration and operation of the Association and, as a result, today operates smoothly and sustainably. Events are well planned, are consistently delivered, profitable and of high quality. This has left representation, advocacy, the external (beyond the membership) promotion of the Association to volunteer members of the Board.

While Board members are understandably highly motivated and interested in promoting the Association, as a volunteer group, Board members have limited time to practicably advocate, evangelize and promote the Association. Similarly, there is limited capacity to build partnerships, to lead communities of practice, to fully investigate opportunities or solutions for the benefit of the broader membership, or to lead projects and initiatives. There is a heavy burden on the key Executives who are already in high-pressure, high-demand roles in their “day jobs”. The rotating nature of executive roles further adds to the challenge.

It is challenging for the Board to fulfill the role of *evangelist* and *spokesperson*. It is also not expected that existing staff could take on these additional responsibilities.

So, in order to take the *next step* and to better support our aims and objectives, the Association must consider the options available to it for building technology and innovation thought leadership and community-building capacity and capabilities within the MISA Ontario team.

## 4.3 Review and Clarify Partner Members Role in the Association

Partner members have long been and must continue to be an essential and integral part of the Association.

Two Partner member representatives currently sit on the Board of the Association. While the relationship is mutually beneficial, occasional conflicts of interest between the goals of the Association and the interest of Partners will naturally arise.

Given the changing role of the Association set out in this strategy, further work will be needed to review and clarify the Association's relationship with Partners. In doing so, the sponsorship model, Board member representation, Board member privileges (voting, access to info, etc.), partnerships in the provision of training, Partner retainment and so on, should be carefully evaluated.

#### 4.4 Improve Website and Digital Services for Members

MISA Ontario must implement enhancements to its website. Although the Association has been working on this area for some time, it's not quite there yet. The membership portal and web services specifically require improvement from a usability standpoint.

While the Association's social media presence is strong and is an asset, members are looking for more opportunities to digitally connect and collaborate around shared topic areas and challenges and opportunities they experience. Online/digital community is one area in which the Association must do a better job. Members have asked for a digital space to engage with the Association and each other. Accessing knowledge artifacts, training and education, subscription-based notifications for content, message boards, search and contact directories should all be made available to members and supported to a sustainable level.

Efforts should be made to acquire and deploy a collaboration platform (e.g., Slack, Discord, Mattermost, Asana, etc.) to help members build community, share information, jointly (and transparently) manage MISA Ontario projects, support ongoing dialogue, remote meetings, whiteboards and team sites.

Web content needs to be another focus. The Association should focus on collecting and compiling content from members on pertinent topics, as well as developing and maintaining its own content, guides and documentation that would be valuable to the membership (policies, job descriptions, RFXs, terms of reference, budgets, studies, reports, etc.).

InfoBase, in particular, is a service that should be more widely used within the community; usability must be improved and content must be broadened and managed in a more consistent manner in order to make the service more usable. Other improvements for this service would be to enhance search and extract and other self-service capabilities.

In addition to the key actions above, there were several other action areas identified through the engagement process. Consolidating ideas from the membership, Board and industry best practices, the following provides additional initiatives to pursue.

#### 4.5 Target the Whole Municipal Technology and Innovation Community

As technology's reach expands and spreads throughout our municipal organizations, more and more staff outside of IT teams are involved in the planning, implementation and management of aspects of technology.

Of course, membership of the Association is at the organization level, so MISA Ontario should aim to engage and welcome these new audiences into the fold. That means that web or digital teams – those involved in information management programs, GIS and data groups, continuous improvement teams, and people involved in innovation and smart city programs – should all be specifically targeted.

Developing content, events and event-based tracks – alongside marketing that is specifically targeted toward expanding the reach of the Association and attracting the broader community – makes sense in trying to grow the profile and impact of the organization.

#### 4.6 Diversification: Explore New Revenue Streams

The Association largely relies on revenue from conferences and events to sustain itself; a surprisingly small portion of its revenue comes from membership fees.

Broadening the appeal of the Association's events to a wider audience (and thus increasing attendance at MISA Ontario events) offers one way of increasing revenue but continues a dependence on MISA Ontario's events business. As the recent Covid-19 situation has shown, disruption of the events schedule can happen and the Association should be ready for such a situation.

Diversification is an important strategy for the Association to pursue.

While there are a number of options, education and training are likely to be the strongest candidates for the Association to diversify into. It is also likely that successfully doing so will be dependent upon growing the reputation and credibility of the Association first.

At the stage when the Association is ready to move forward, exploring options – including self-delivery, the scope for partnership with other MISA chapters, and opportunities to partner in the delivery of programs – would be important to consider.

#### 4.7 Provide Education Related to Modernizing IT / Digital Transformation

Because expectations of IT teams are growing day-by-day, IT leaders and teams must now connect, engage, and inspire the executive level of their organizations as well as their Councils. Modern IT services within municipalities are transitioning from *provider* to *partner*, creating a need for IT leaders and teams to take on new organizational leadership responsibilities.

A select few groups in the municipal IT sector have been able to make this transition; many others are in the midst of the journey, while others have not yet been given the opportunity.

Providing avenues for the Association to share experiences and learning, establish tools, and communicate effective tactics and techniques are methods that can be used to assist members in their growth and evolution.

A working group could identify a curriculum that would equip IT professionals to better support their executive level and Council. The group should consider how to establish and deliver the program (industry partnerships, retain external partner, co-author with the membership, acquire existing service, etc.). This initiative could first be tested through small scale pilot initiatives prior to scaling out to the entire membership.

The group should consider how to meet demand for education that supports digital transformation more broadly. In order to *be digital*, organizations require new workforce skills and capabilities – at the executive, management and staff level. Federal and provincial governments, as well as some municipalities, are developing digital education programs. As another potential revenue stream, these education initiatives could be offered at various price points, similar to what was mentioned previously. Depending on the cost of development and partnership involvement, the Association could offer some programs for a fee to both members and non-members.

Collaborating and partnering through MISA Ontario could lead to the development of shared content and delivery mechanisms that would spread the cost and broadly benefit the community as a whole.

#### 4.8 Develop and Execute an updated Communications/Marketing Plan

To promote the new vision and strategy, a communications/marketing plan will help to communicate MISA Ontario's goals and objectives to its members and prospective members, and beyond to those it intends to influence.

The plan should identify specific targeted audiences, develop key messages (a revised tagline, an improved elevator pitch) and support a framework for two-way conversations with members and evaluate success in doing so.

An external partner should be retained to help develop a communications/marketing plan to translate MISA Ontario's vision to the membership and beyond. Although the current membership is strong, the Association needs to continue to speak to those that are new to public sector IT departments and maybe unaware of what supports are available to them. Many coming into this field require impartial guidance to help them be successful in their own organizations.

The plan should consider key messages that accord with the vision, spokespeople, delivery channels (digital being key), a feedback mechanism to support ongoing engagement, current state/market analysis, success factors, membership/partner

retainment and so on. The plan should also consider promoting certain standards, approaches or frameworks as "approved by MISA" (see data standards and best practices action above). The appeal here would be to strengthen MISA Ontario's position as an active voice supporting the best interests of cities. The plan should also address how to support effective engagement and collaboration in support of MISA-led projects as well as the communication of services available to members.

#### 4.9 Mutual Aid and Advice as IT Emergency Response Corps

Members of MISA Ontario occasionally encounter major problems – natural disasters, pandemics, fire and flood, as well as growing incidences of cybercrime. In such situations, informal networks of support within the local municipal community often step up to help those facing adversity.

MISA Ontario has a unique opportunity to establish and coordinate a volunteer community made up of members who can work together to provide aid and advice to other communities in their hour of need.

#### 4.10 Improving IT Procurement – Online RFP Repository & OPBA Partnership

Numerous discussions across the membership point to the need to better support IT procurement. Technology procurement is clearly a consistent pain point for IT teams across municipalities – something in which MISA Ontario could play a leadership role, in helping its membership.

One approach is making it easier for members to post, search and share procurement-related information, templates and best practices. These materials are already shared freely between members, but there is no “one stop shop” to allow people to begin their own information gathering efforts. Members have consistently asked “what are others doing?” – so addressing this in terms of IT procurement would be a huge asset for the membership.

As a starting point, promoting and actively maintaining a simple IT RFP repository that allows members to search and download procurement-related materials would be greatly beneficial. Working with bid exchange providers to use APIs to implement this functionality would be the best approach.

Future phases of work may consider collecting and sharing data as well as providing general discussion forums for people to ask questions of each other. These conversations can organically develop an FAQ of sorts, allowing members to derive context around the artifacts made available.

Secondly, working through a partnership with the OPBA and others to help develop modern IT procurement best practices (e.g., rosters, vendors of record, group purchasing, piggybacking), could be extremely beneficial to the MISA Ontario community as well as the municipal community as a whole.

#### 4.11 Better Engage with Other Levels of Government

To be an active voice for municipalities, the Association will need to progressively build and leverage relationships with both provincial and federal levels of government.

MISA Ontario should actively pursue opportunities (both formal and informal) for their representatives and Board members to become contributing partners for both provincial and federal level initiatives such as budget, citizen engagement around digital, open data, standards development, shared services, etc.

This could also include actively curating and building partnerships to learn and share practices between municipalities and other levels of government. Digital academies, labs and collision spaces are concepts that MISA Ontario can consider developing/sponsoring in partnership with provincial and federal agencies – many of which are keen to learn how to become more "agile" and "innovative" like cities and towns.

#### 4.12 Broaden Membership to Small, Rural and Indigenous Communities

In order to ensure that MISA Ontario develops a mandate that reflects the entire provincial contingent of civic IT professionals, efforts should be made to engage with and add members from small, rural and indigenous communities.

Approximately 150 of the 444 municipalities in Ontario do not have any in-house IT staff. The Association needs to consider their needs and discover ways to provide them with the information they need to be successful. Although it is important that it remain vendor agnostic, the Association can highlight and inform the membership about how non-in-house IT organizations can "out task" and partner with service providers broadly to provide support for their municipal organizations.

Targeted outreach efforts could also be conducted through a focused communication / marketing plan, quarterly webinars presenting MISA Ontario's value proposition to potential members (perhaps led by members), attendance and promotion at conferences/events taking place in rural jurisdictions regarding rural/regional topics, direct incentive programs for new members in under-represented communities, publication of knowledge materials that specifically address key technology challenges and trends in small, rural and indigenous communities. The Association may also want to consider incentivizing those who are able to identify new members from under-represented communities.

In the long term, as the Association's leadership and credibility grows, it may be able to take a larger role, either as a commissioner of IT services on behalf of other communities, or as a provider or coordinator of IT services.

#### 4.13 Improve Volunteer Model and Better Leverage Alumni Skills and Experience

There are currently a variety of programs, services and events in which volunteers, and alumni could participate. As the Association grows into a stronger thought leadership

role, an increased number of initiatives and opportunities to get involved should be developed.

The Association should define clearly how volunteers and alumni can actively contribute to the Association and its work. Once the onboarding path is determined, a targeted recruitment of new volunteers can be undertaken to ensure there is a diversity of contributors (small/rural, indigenous, women, younger/older members, alumni, etc.).

As part of building strong online communities discussed earlier, the Association should work on building strong onboarding processes that actively help new members and individuals navigate the Association, the services and products available to them, and help them get involved in communities that are relevant to them and their interests.

## 5. Work Plan

The following table identifies the key activities and timing associated with the main strategy actions.

ID	Action	Description	Responsibility	2020	2021	2022
1	Thought Leadership – For MISA Ontario Members	Establishing thought leadership by editorializing – showcasing, developing documenting and sharing good practices and standards for the membership (and prospective members) as well as building communities	Board		X	X
2	Establish who will be the Technology Voice for MISA Ontario	Thought leadership through writing, sponsorships, delegations, speaking engagements, panel discussions are methods that the Association can use to build this profile and reputation with existing membership and beyond.	Board		X	X
3	Clarify Partner Members Role in the Association	Clarify the Association's relationship with Partners and create an operating guide to ensure industry Partners are effectively supporting the highest needs of members.	Board		X	
4	Improve website and digital services for members	Identify action plan for new enhancements to website, leveraging social media experience. The new site should provide more opportunities to digitally connect and collaborate around shared topic areas, challenges and opportunities experienced by the members.	Executive Director	X	X	

ID	Action	Description	Responsibility	2020	2021	2022
5	Target the Whole Municipal Technology and Innovation Community	Target new members beyond the IT Leaders into membership events. This includes web or digital teams, those involved in information management programs, GIS and data groups, continuous improvement teams, and people involved in innovation and smart city programs.	Executive Director		X	X
6	Explore New Revenue Streams	Develop and execute a revenue diversification plan that evaluates options and diversifies MISA Ontario revenue from events-based revenue	Executive Director		X	X
7	MISA Ontario to Provide Education related to Modernizing IT / Digital Transformation	A working group should be formed to identify a curriculum and training delivery options that could equip IT professionals to better support their executive level and Council.	Board		X	X
8	Develop and Execute Communications/Marketing Plan	An external Partner should be retained to help develop a communications/marketing plan to translate MISA Ontario's vision to the membership and beyond.	Executive Director		X	
9	Mutual Aid and Advice as IT Emergency Response Corps	Establish and coordinate a volunteer community made up of members who can work together to provide aid and advice to other communities in their hour of need.	Board			X
10	Improving IT Procurement – Online RFP Repository & OPBA Partnership	Promoting and actively maintaining a simple IT RFP repository that allows members to search and download procurement related materials.	Board		X	

ID	Action	Description	Responsibility	2020	2021	2022
11	Better Engage with other Levels of Government	Progressively build and leverage relationships with both provincial and federal levels of government.	Board	X	X	X
12	Continue to Broaden Membership to Small, Rural and Indigenous Communities	Build on engagement with small, rural and indigenous communities, presenting MISA Ontario's value proposition.	Executive Director & Board		X	
13	Improve Volunteer Model and Better Leverage Alumni Skills and Experience	Define clearly how volunteers and alumni can actively contribute to the Association and its work. Once the onboarding path is determined, a targeted recruitment of new volunteers can be undertaken to ensure there is a diversity of contributors (small/rural, indigenous, women, younger/older members, alumni, etc.).	Board	X	X	
14	Review MISA Ontario Team roles and responsibilities	Review current staff roles and responsibilities to improve focus on supporting the goals and objectives of this strategy	Board		X	
15	Develop detailed implementation plan	Once key strategic decisions have been reached by the Board, implementation of those decisions will require a more detailed implementation plan than that included here.	Executive Director	X	X	
16	Performance Measurement Program	Establish comprehensive performance reporting / monitoring program to track engagement and effectiveness of the Association	Executive Director		X	X

## 6. Measuring Progress and Success

The success of any strategy must be measured, not just in the completion of the initiatives identified within it, but with measures that track whether the initiatives are having the desired effect.

The following measures are suggested as ways for MISA Ontario to track activity, engagement and sentiment.

### Activity and Engagement

- Increased engagement (KPI measures around social, online community, sharing)
- Define demographic measures that are important to the Association (e.g., target groups – Executives, Councillors, IT leaders, IT staff) and begin to track this information across all events and interactions
- Attendance at all events
- # of articles written
- # of speaking engagements, panels, etc.
- Content being downloaded/used/applied
- Partnership initiatives / projects
- Member loyalty (churn of municipal and Partner membership)

Sentiment – requires consistent surveying of various audiences (responsibility of the Executive Director)

- Member satisfaction
- Membership Net Promoter Score (NPS) for MISA Ontario is increasing
- Sentiment that MISA Ontario is known within membership organizations and is recognized as an authoritative source
- MISA Ontario is recognized as the authority on municipal technology
- MISA Ontario is recognized as the voice of municipal IT in Ontario to federal and provincial government

Establishing a balanced scorecard that allows the organization to view the Financial, Customer, Internal Process and Growth perspectives of the Association concurrently would be helpful to the administration and the Board.

## APPENDIX A

### Interacting with the Association

We imagined how the Association could evolve its role through the use of various personas. The roles we developed are commonplace within the municipal sector and are designed to highlight needs through their perspectives.

These fictional anecdotal stories are intended to illustrate what MISA Ontario might look like in the future, after executing this strategic plan.

#### A New Hire into IT

*I was hired as a Business Solutions Manager for a mid-sized municipality from the Healthcare sector. I knew no one in the industry and nothing about the common challenges and solutions to municipal technology. Luckily, my boss looped me into MISA Ontario's online community for people supporting business solutions for their municipalities (there are other communities for Digital, Data, GIS and Infrastructure Management). There, on the collaboration portal on the website that they use, I connected with more than 100 other people from municipalities across Ontario dealing with similar challenges to mine. I was a bit nervous, but I introduced myself and could quickly begin to ask questions of the group and get various perspectives from others on the challenges I was facing, that they'd tackled before me. We host a video call 4-5 times a year, but most of them I've never met in person. Still, I know that they are there ready to offer their advice, share their experience and suggestions when I need them. When I get to go to the conference, it's great to see some friendly faces. I don't do anything major now without checking in with the group!*

#### Newly Responsible for IT Security

*I was promoted into a role where I was responsible for IT security. One of my first tasks was to review our policies and procedures. I really didn't know what we had, or what we should have. The first place I visited was the MISA Ontario website, where I knew I could find something in their library of resources. They have a really simple IT security checklist that was super useful, and an IT policy library that got me started with an Information Security policy and a security incident response plan. In addition, they point you to useful resources from SANS (SysAdmin, Audit, Network, Security) and from the vendor community. It really helped me get started.*

#### Planning for a New Solution

*Our clerks' staff were planning to replace our Agenda Management system and wondered what other municipalities were using. We suggested that we check out the MISA solutions inventory. We searched "agenda management systems" and got a list of the solutions MISA members use; the inventory also showed us other municipalities that had, in the last couple of years, made changes and what solutions they had moved to. We contacted a few to find out what they had learned from the experience and what they would change. What's even better is that we were able to find other municipalities that are planning to do similar projects. Thankfully, MISA Ontario has worked with OPBA (Ontario Public Buyers Association) to aggressively promote piggyback clauses on all of their members' technology procurement processes, so we*

were able to ultimately onboard a solution that most municipalities are running without having to run our own procurement process. This was hugely valuable as we likely wouldn't have made these connections and realized this value without MISA Ontario's help!

### Ransomware Victim

*We were hit by a ransomware attack. I knew what to do, but just did not have enough staff to get it done as quickly as we needed. I put out a call to the MISA Ontario Emergency Response Corps – they are a volunteer group of members that work in the security field that offer their assistance in times like these. It was so helpful to have our peers from other municipalities not only share their experience from other, similar incidents that they have worked on, but also roll up their sleeves and chip in on some of the heavy lifting we needed to do. We can't thank MISA Ontario enough for actively supporting these opportunities to broaden our community and enhance our abilities to help each other out.*

### AMCTO Conference Attendee

*The Technology Track at the AMCTO conference (Association of Municipal Clerks and Treasurers of Ontario) has been really eye-opening. Everything we do in government now has a technology angle – and bringing technology leaders to talk to our group has really helped them learn how to ask the right questions of vendors, be better partners with their IT teams and to become allies in civic innovation more broadly.*

### Treasurer in a Small Municipality Responsible for Technology

*I am responsible for technology in our organization, but my background is in Accounting and Administration – not technology. I needed help to figure out what things we are not thinking about because we simply don't know enough. MISA Ontario has this very helpful "Guide to IT for Small Municipalities" that provided so much helpful information and confirmed that we were actually not doing so bad. We were missing a few things and both the Guide and connecting with other members of the community, helped me figure out what we needed to do to address the gaps.*

### A New IT Manager

*I was hired as an IT Manager for a small Town from the energy sector. I knew no one in local government and very little about the common challenges associated with municipal technology. Thankfully, a MISA Ontario "buddy" from a nearby municipality reached out to me on my third day at the Town. We talked for a bit, made a date to grab lunch and she sent me a MISA welcome pack which really helped me out. It provided some helpful ideas for my first few weeks in the role that I hadn't thought about; the "Guide for IT Managers New to Municipalities" was especially useful to me. It let me know about the resources that I could access – the technology and project directories were super helpful. It also highlighted the online discussion channels that would be useful and the upcoming events that I should know about. What other Association does that? It's awesome and really helped to welcome me and help me find my feet in a new role.*

### Finance Director

*We were recently trying to figure out if we were spending appropriately on technology. Some on Council felt we were spending too much on IT, while most of us on the leadership team felt we were spending too little. I heard at AMCTO that MISA Ontario has commissioned some fascinating research into IT spending and investment in municipalities across Ontario and across the country. What this research showed to us was that we were spending below the average and if we wanted to be more innovative (like the communities we aspire to be like), we would have to increase our technology investment by approximately 2%.*

### Personal Development

*I was interested in getting involved in something outside of work that would expand my horizons, help me make new connections, and help with my career development. I visited the MISA website where I found a “Get Involved” section that told me about some options – project teams, working groups, and board options. I sent my details in and after chatting with a MISA representative, I got involved in a project developing some best practices for digital signatures in municipalities. It was fun and a great way to get more involved. I am busy with some personal projects right now but I will definitely do more of these things with MISA in future.*

### CAO

*I saw the Executive Director of MISA Ontario speak at our most recent CAMA (Canadian Association Municipal Administrators) conference. The talk was about digital transformation in municipalities and how municipalities (some smaller than ours) have been making great strides. It really helped me recognize that we needed to step up our game around technology – and prompted me to initiate a much-needed conversation with our leadership team and IT group.*