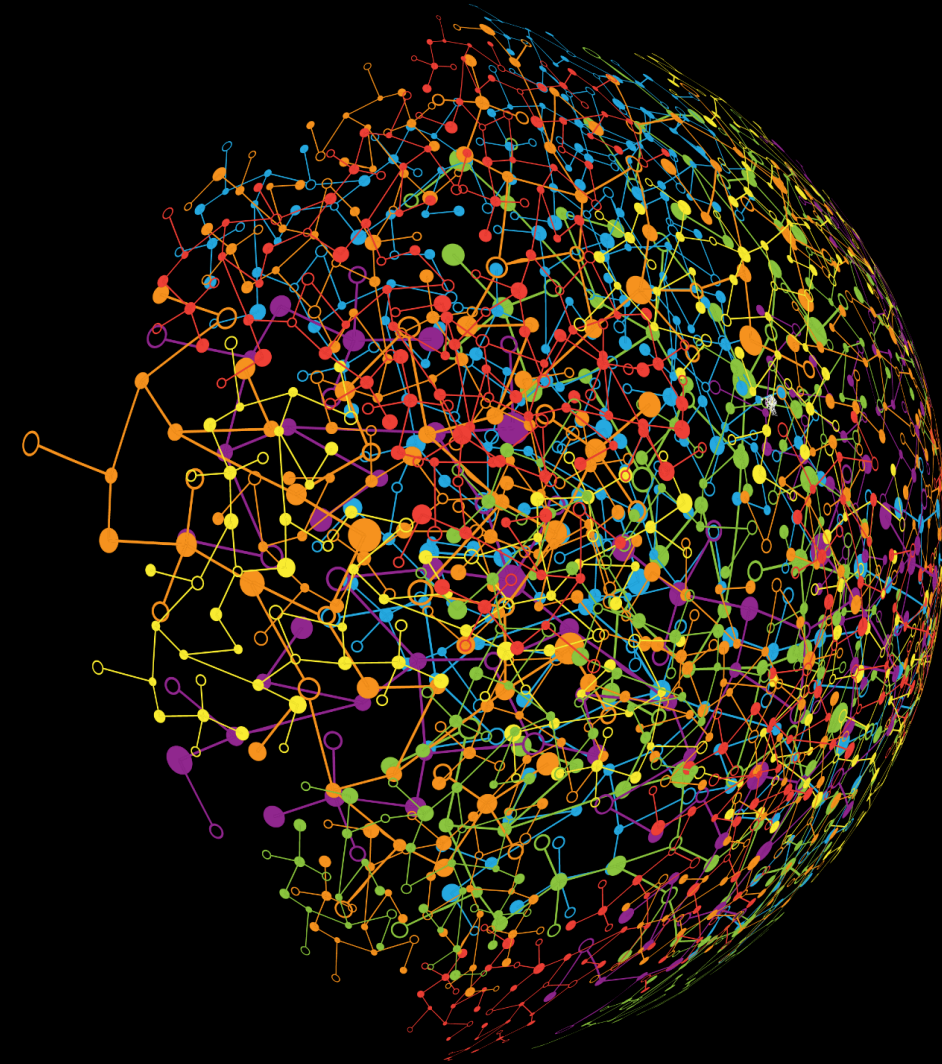




# Corporate Data Management Strategy

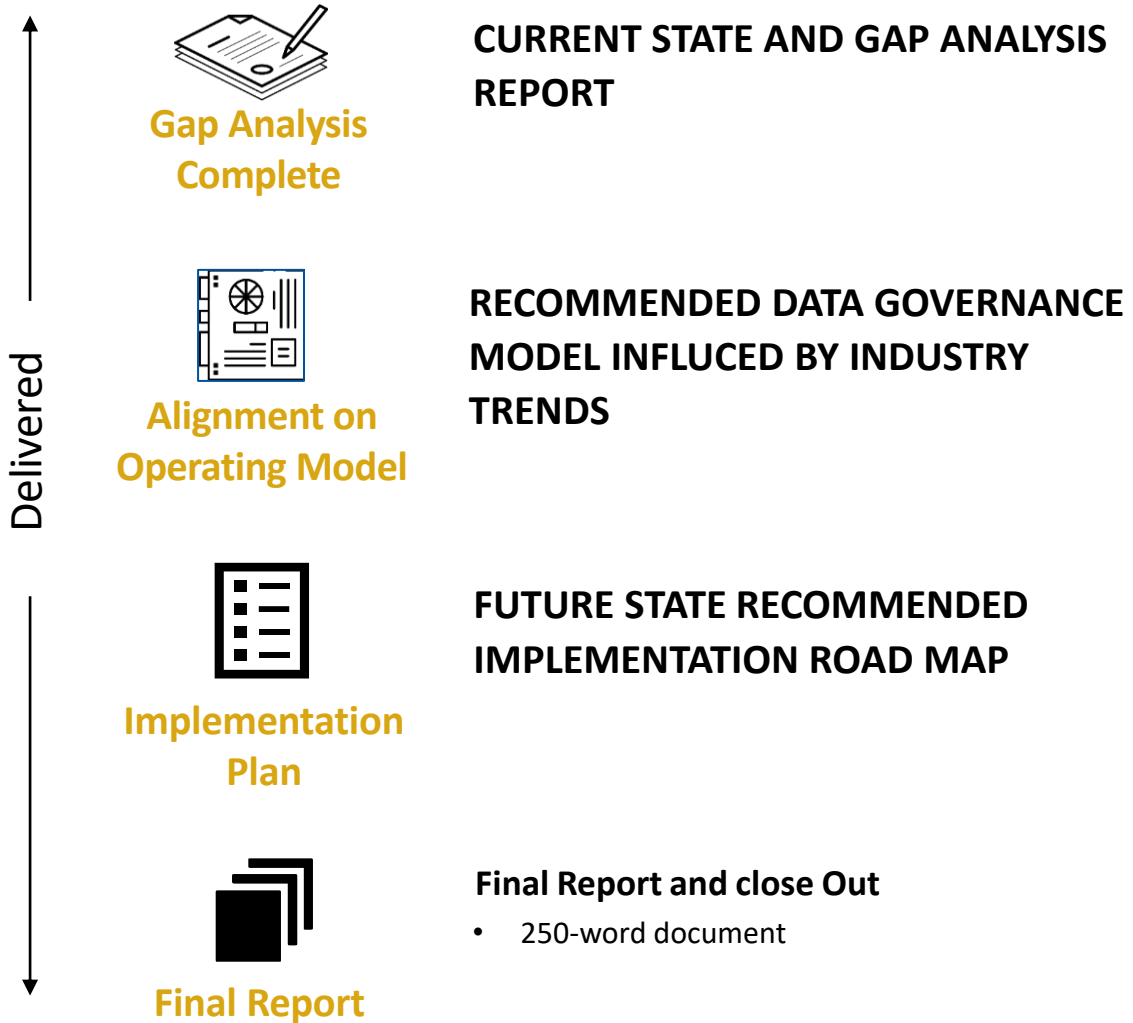
## Executive Summary

December 13, 2022



Omnia AI 

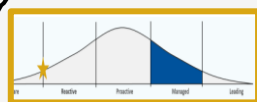
# Project Outcomes



**23** INTERVIEWS & DATA COMMITTEE MEETINGS  
ACROSS 7 DATA CAPABILITIES



ARTEFACTS REVIEWED **15+**  
INDUSTRY PEERS LEVERAGED **5+**



DESIRED TARGET STATE FOR TOWN IS  
EXPECTED TO BE “MANAGED”



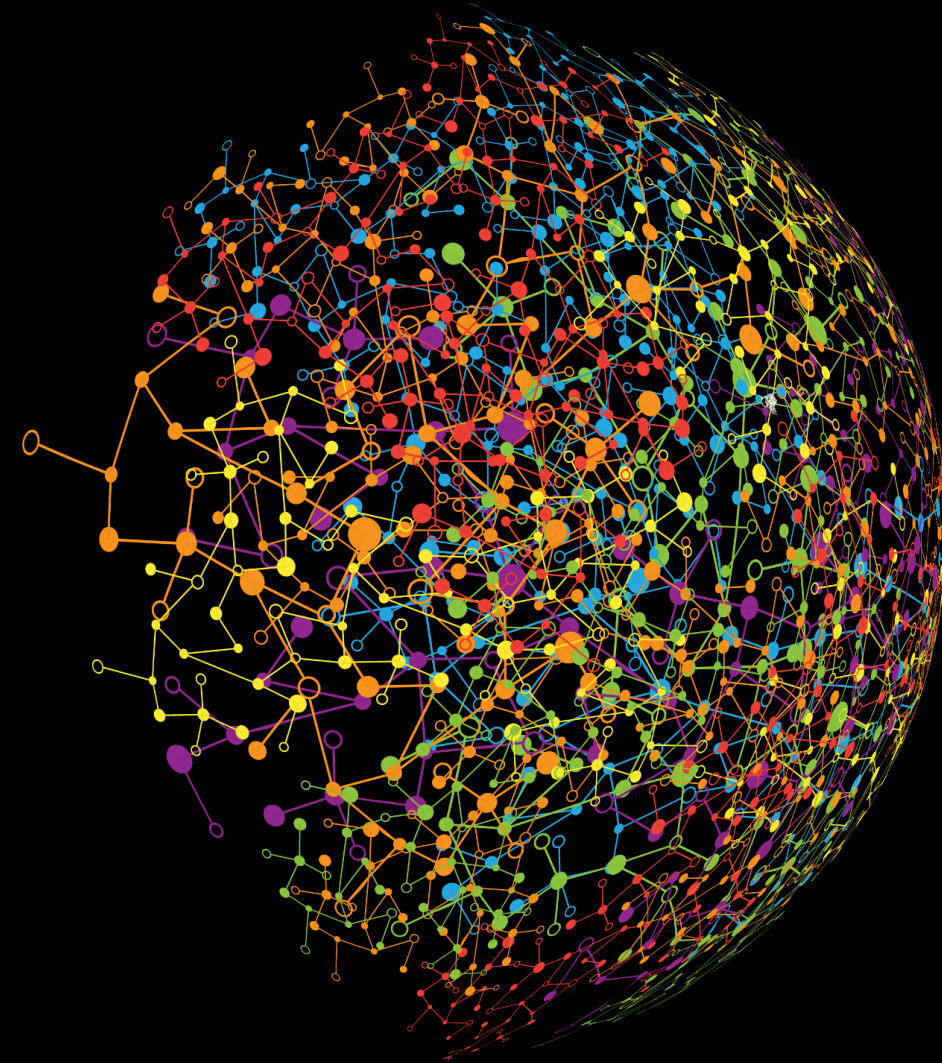
ALIGNED ON HUB & SPOKE CORPORATE DATA  
GOVERNANCE OPERATING MODEL



SPRINT BASED APPROACH TO IMPLEMENT  
HUB & SPOKE OPERATING MODEL; VISIBILITY  
ON SHORT TERM INITIATIVES



## Why is Corporate Data governance needed & Its Benefits for Town of Oakville?



# Need for Corporate Data Management Strategy at Town of Oakville

“**Data Governance & Management** is the orchestration of **people, processes, and technology** to manage **critical corporate-level data assets** by using **roles, responsibilities, policies, and processes** to ensure data is **accurate**, and aligns with **Town of Oakville’s overall strategic vision**.”



## Why Corporate Data Management Strategy?

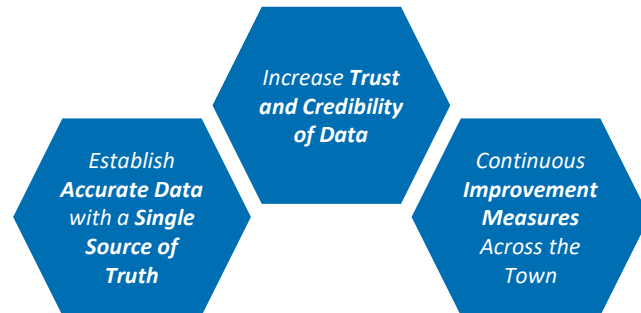
Aligning on **strategic corporate vision** to ensure Town stakeholders can achieve **business goals** by approaching data-related capabilities with **consistency**, thereby **reducing risk, improving standardization and data quality, and minimizing duplication of effort**.



## Why Now?

Town stakeholders have highlighted the **need for Corporate Data Management Strategy** to ensure **defined ownership and standardized process** help effectively **capture, utilize, retain, share, access, and safeguard data to enhance service delivery to community**

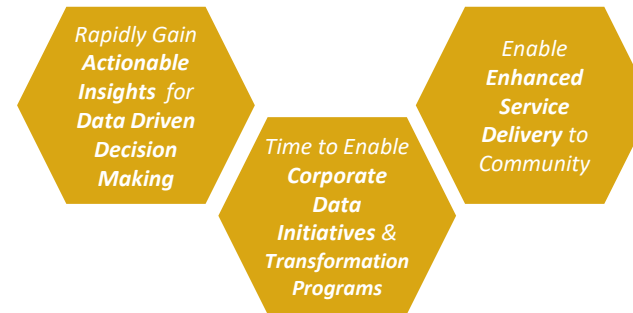
### Standardization



**“Absence of single source of truth and integration standards leads to duplication of time and effort”**

**“No clear processes leads to an over-reliance on manual intervention for quality and confidentiality”**

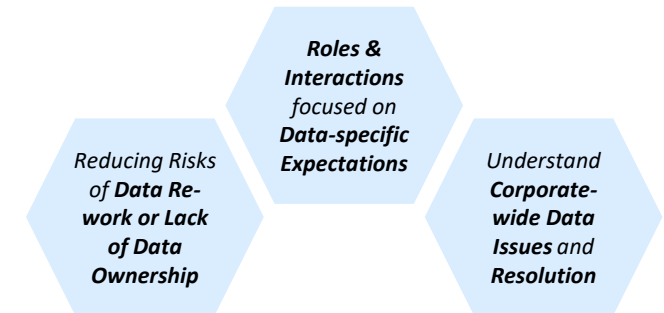
### Accessibility



**“Urgent need for self-serviced data access policies, otherwise report-generation can take several days”**

**“Lack of data literacy at a Corporate level diminishes Town’s ability to maximize potential of data initiatives”**

### Ownership

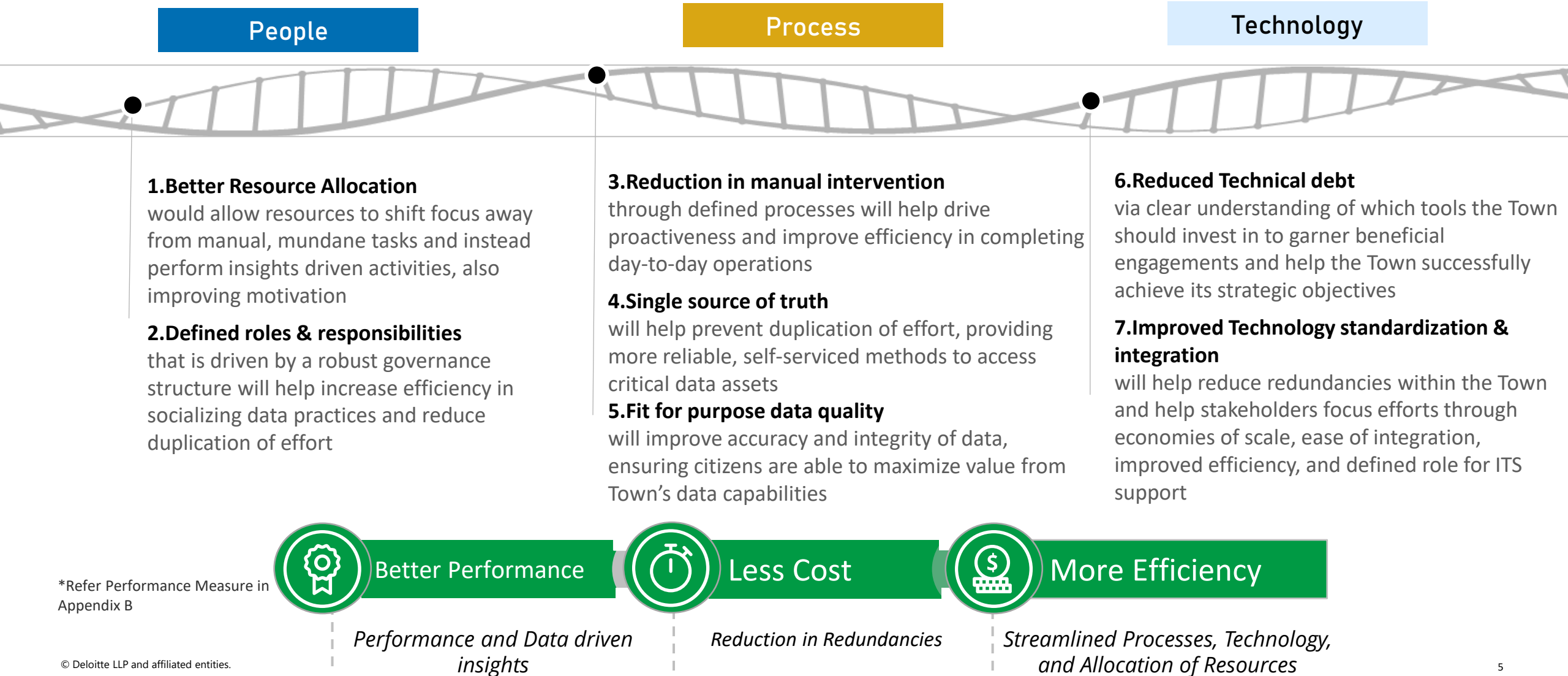


**“No clear data governance operating model in place at a corporate level”**

**“Misalignment in data ownership expectations between Business and Technology”**

# Value-driven efficiencies\* through Corporate Data Strategy & Governance

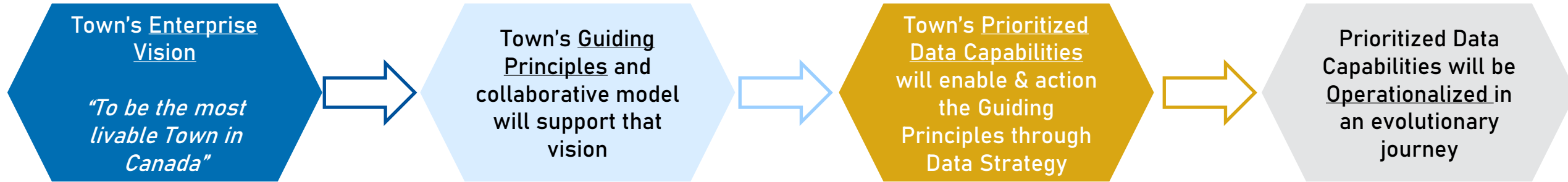
The defined data management strategy for the Town of Oakville will help streamline many redundant activities within the Town and substitute these with focused, constructive, and data-driven activities that will help reduce costs and improve efficiencies



\*Refer Performance Measure in Appendix B

# Corporate Data Strategy is enabled by critical corporate data capabilities

In order to create a Corporate Data Strategy, the Town needs to ensure its vision *"To be the most livable Town in Canada"* is embedded into all aspects of the culture - guiding principles, people, process and technology - to achieve the target data state



## Enterprise Data Vision

*"To be the most livable Town in Canada"*

## Guiding Principles

Minimize Data Risk & Exposure



Promote Data-driven Decision Making



Improve Quality of Information



Measure performance through data



Better our ability to integrate data



Align on Standards & Processes



Enhance data protection & privacy through regulatory compliance



Deliver Customer service excellence



## Critical Corporate Data Management Capabilities

1.Data Protection & Privacy

2.Data Operations & Decision Enablement

3.Data Quality Management

4.Business Intelligence & Analytics

5.Data Integration

6.Data Governance

7.Master Data Management

# Critical Corporate Data Management Capabilities



## 1.Data Protection & Privacy

The continuous process of protecting and safeguarding the confidentiality and integrity of data .Critical elements- **encryption, classification, data access management** etc.

Encryption

Anonymization

Classification

Masking

Data Access Management

## 2.Data Operations & Decision Enablement

The collection, storage, access, evaluation, and utilization of data to enable operational transformation. Critical elements-**SLA definition, authoritative data source registration, and data preparation**

Authoritative Data Source Registration

SLA Definition

Data Evaluation

Data Preparation

Synthetic Data Generation

Test Data Preparation

## 3.Data Quality Management

The measurement of the health and usability of all data assets across the Town in a standardized manner. Critical elements- **quality rule design, quality profiling, issue management**

Data Quality Rule Design

Data Quality Profiling

Issue Management

Root Cause & Impact Analysis

Data Quality Monitoring & Visualization

## 4.Business Intelligence & Analytics

Managing how insights are governed and how data is presented to end-users and consumers. Critical elements- **Reporting & Visualization, Model validation**

Reporting & Visualization

DevOps/ MLOps

Model Validation

Analytics & AI Modeling

## 5.Data Integration

The approach for sourcing, routing, orchestrating, and governing shared critical data assets to minimize redundancy within the Town. Critical elements- **metadata management, Technical & business glossary definition, ETL**

Metadata Management

Metadata Access

Technical & Business Glossary

Data Lineage

Data Ingestion

Extract Transform Load (ETL)

## 6.Data Governance

Processes to guide Organizational change management towards operational quality and efficiency.Critical elements- **Operating model, roles & responsibilities, Policies & Standards**

Data Governance Operating Model

Roles & Responsibilities

Data Governance Framework

Policies & Standards

Regulatory Compliance

Communication & Change Management

## 7.Master Data Management

Applying business rules to data. Critical elements- **Corporate solution architecture, data repository**

Master Data Repository

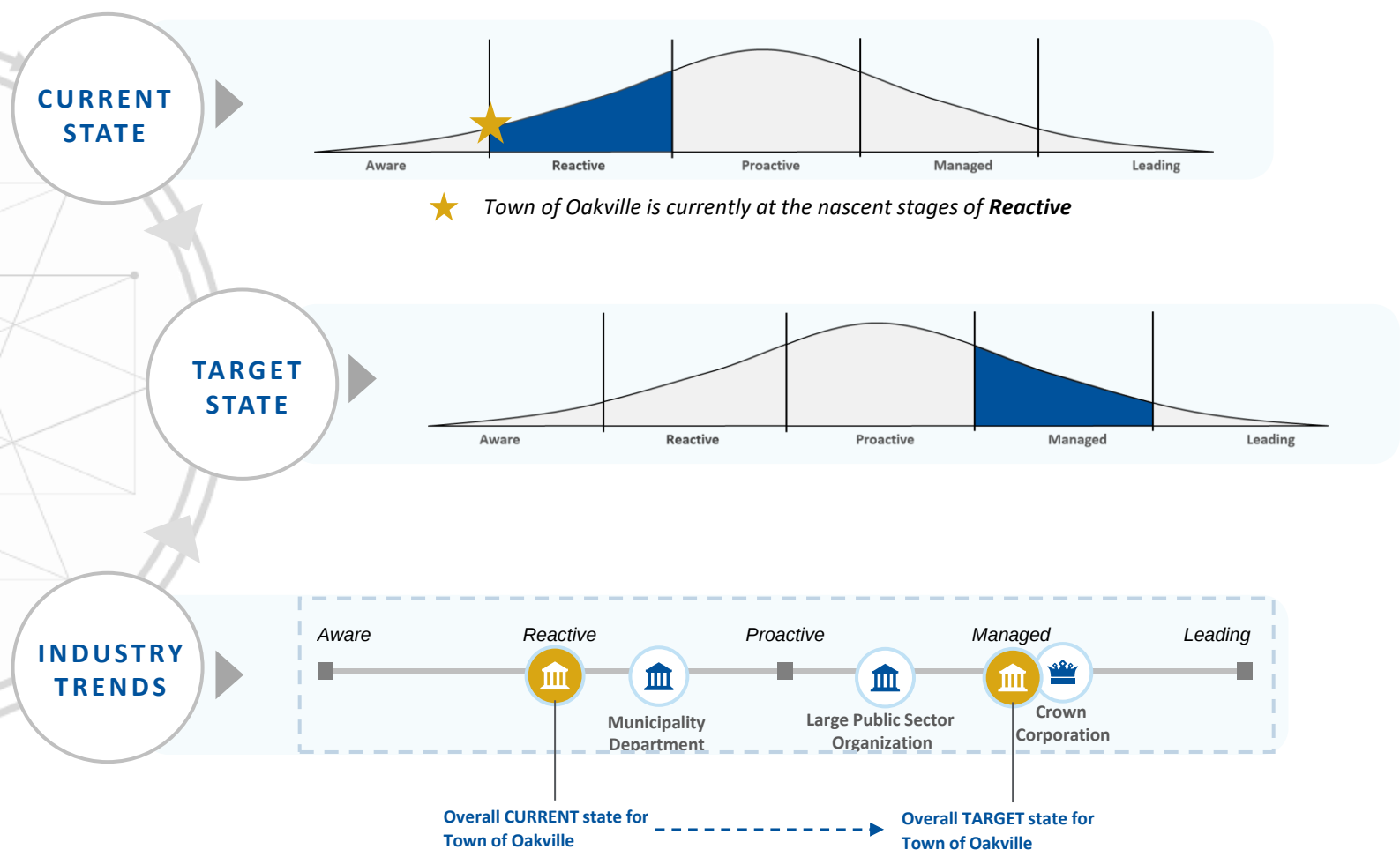
Match Merge Survivorship rules

Corporate Solution Architecture

Business Taxonomy & Hierarchy Management

# Current State Assessment & Desired Target State

Overview of current state of Town of Oakville’s data management capabilities. The recommended target state is aligned with industry best practices. The key management capabilities utilized for the operating model will enable the Town of Oakville to improve their current capabilities to effectively achieve its data management goals goals



# Industry Insights – Leading Data Governance Trends

**Key Takeaway** – Town of Oakville’s maturity is in line with other municipalities in implementing data governance and management capabilities. Focus is given to specific transformational initiatives or specific data management capabilities instead of standing up an enterprise level function that drives Corporate data strategy. Other sectors such as private and public sector are ahead by taking an enterprise level approach with a view of implementing data driven decisions across business departments.

Based on the analysis of industry peers, below are the trends and leading practices being leveraged to create Town’s Corporate Data Management Strategy.

- Mature organizations are adopting a **hub and spoke** data governance model, in which a **central function** acts as the **enabler of data governance and management** within the organization by working in **partnership with technology teams** to evolve into a self-serviced organization.
- Senior leadership accountability is established and measured through their support in driving the corporate data strategy, whilst ensuring that capacity and resourcing requirements are fulfilled.
- Successful implementation of **data and analytics strategy** involves aligning with the **business vision** and enabling the **strategic objectives** through **prioritization of data capabilities**; these are **transformed by leveraging technology** to achieve **scalability and agility** throughout the organization.
- Through **continuous measurement and monitoring** of data, true value of data is realized and communicated throughout the organization; this can support **change management** initiatives and enable the unification around data management practices.
- Execution of effective **data governance standards and practices** requires a **pragmatic approach** that necessitates an **evolutionary process** and **flexible approach** to achieve the **desired enterprise-wide outcomes**.

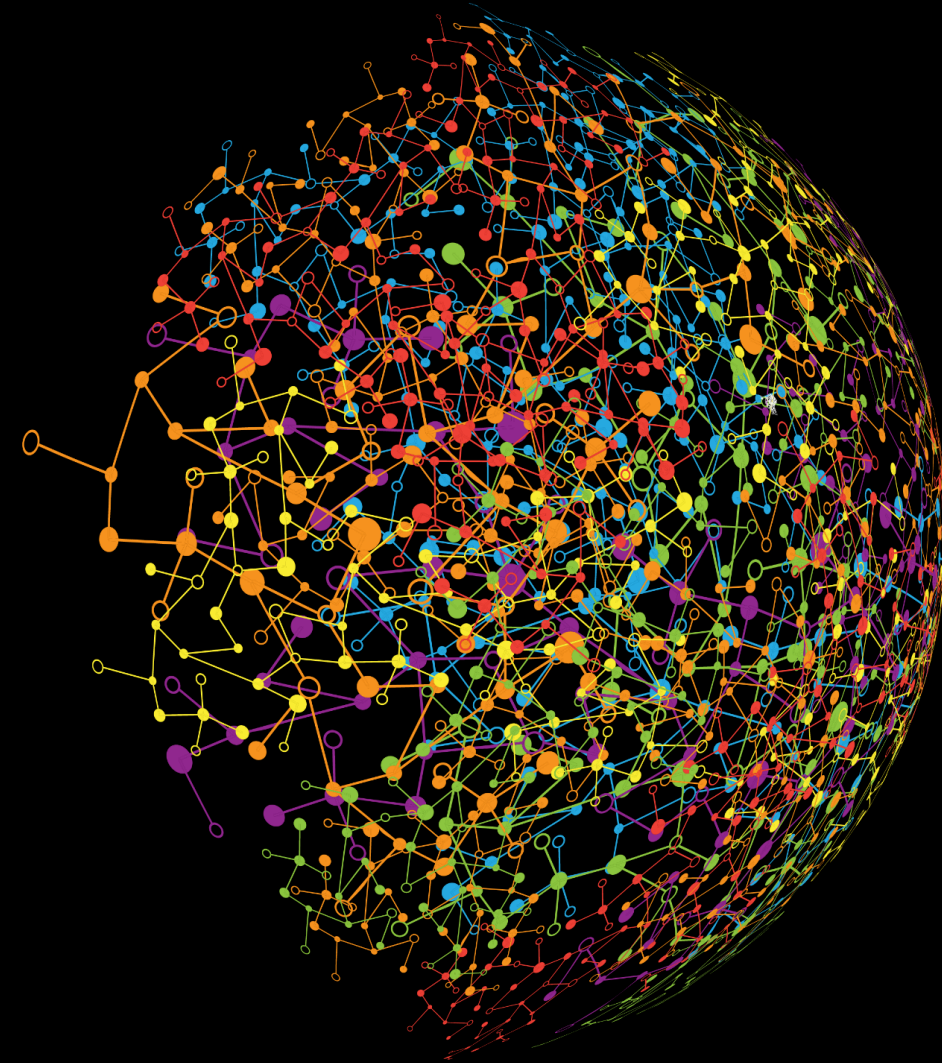


# Industry Use Cases Analyzed

Observation of data governance structure of other analogous industry peers will enhance Town of Oakville's awareness of best practices for achieving target operating model

|                                                      | Aware | Reactive | P1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Proactive | P2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Managed | P3                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Leading |
|------------------------------------------------------|-------|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
|                                                      |       |          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |         |
|                                                      |       |          |  Municipality Department (P1)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |           |  Large Public Sector Organization (P2)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |  Crown Corporation (P3)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |
| Role of Enterprise Data Function and Operating Model |       |          | <p>Seen as a <b>Functional Unit</b> for the organization, that performs key data management practices for the organization for a program (GIS)</p> <p><b>Functional model</b></p>  <ul style="list-style-type: none"> <li>Departments performing day-to-day data management activities</li> <li>"Functional Team" enabling Data Management</li> </ul>                                                                                                                                                                                                                                                                               |           | <p>Seen as a <b>Policy Setter</b> for the organization, defining the policies and standards that other line of businesses need to comply with</p> <p><b>Centre of Excellence (CoE) model</b></p>  <ul style="list-style-type: none"> <li>Departments as Data Stewards</li> <li>Enterprise Data &amp; Analytics Function</li> </ul>                                                                                                                                                                                                                                                                                                                                |         | <p>Seen as an <b>Innovator</b> for the organization, enabling data and analytics capabilities</p> <p><b>Centre of Excellence (CoE) model</b></p>  <ul style="list-style-type: none"> <li>Departments as Data Stewards</li> <li>Centre of Excellence (CoE)</li> </ul>                                                                                                                                                                                                                                                                                                                               |         |
| Overview of Responsibilities                         |       |          | <ul style="list-style-type: none"> <li>The organization has an operating model wherein enterprise data management strategy and ownership is the responsibility of the GIS and IT teams that oversee data management capabilities alongside their core operations</li> <li>Operational and technical support is provided based on the program needs, whilst building foundational data integration, reporting, and standardization practices</li> <li>Data literacy is promoted, and data champions are identified within departments and trained on open data policies to create a more robust data governance structure</li> <li>Data quality management and monitoring is siloed within each department</li> </ul> |           | <ul style="list-style-type: none"> <li>The organization has a federated data governance model with data stewards within each department</li> <li>The enterprise data &amp; analytics function drives analytics adoption and maturity throughout organization and leads the department-wide initiative to establish data governance</li> <li>They establish policies and standards and are responsible to bring cultural change within the organization through training and communication of best practices</li> <li>The organization has a data domain stewardship model and data domain stewards are responsible to develop business rules, monitor quality, risks and issues including report on progress at data governance committee</li> </ul> |         | <ul style="list-style-type: none"> <li>The organization has Centre of Excellence data governance model with data stewards within each department</li> <li>CoE is the ultimate "Go Team" for data governance standards, processes, and policies to drive consistency and quality, while coordinating with data owners for best practices</li> <li>Data stewards in departments are responsible for the execution of day-to-day business data management activities for their lines of business in accordance with the standards established by the CoE</li> <li>Common technology and tools are centrally managed</li> <li>Data monitoring teams sit within the departments</li> </ul> |         |
| Data Capabilities                                    |       |          | <ul style="list-style-type: none"> <li>Data Inventory and Catalogue</li> <li>Data Dashboarding</li> <li>Document management &amp; retention</li> <li>Data Governance initiated for a program</li> <li>Data Literacy and Culture</li> <li>Data Integration</li> <li>Technology is centralized within IT</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                    |           | <ul style="list-style-type: none"> <li>Enterprise-wide Data and Analytics Strategy</li> <li>Data Management</li> <li>Data Literacy and Culture</li> <li>Data Tools and Architecture</li> <li>AI Policy &amp; direction including Ethical Considerations</li> <li>Technology is centralized and partners with Enterprise Function</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                          |         | <ul style="list-style-type: none"> <li>Data Ownership</li> <li>Analytics &amp; Reporting</li> <li>Data Protection and Privacy</li> <li>Data Quality</li> <li>Technology Enablement</li> <li>Data Access and Integration</li> <li>Data Culture</li> <li>Technology is centralized and partners with Enterprise function</li> </ul>                                                                                                                                                                                                                                                                                                                                                     |         |

## What should be the Corporate Data Governance and Interaction model?



# Establish a dedicated function that enables Corporate Data Governance

The Corporate Data Governance and Analytics (CDGA) function will engage with business and technology leaders to promote the overall data vision, provide hands-on support for the execution of data & analytics initiatives and capability maturity, and collaborate in partnership with technology leaders to drive shared data management and technology platforms.

## Corporate Data Governance & Analytics (CDGA) Mandate

The CDGA will engage in the following interactions:

- Engage with **Business and Technology Leaders** to promote the overall vision for Town of Oakville's data priorities through established governance mechanisms and forums
- Enable the **corporate data and analytics strategy** and **data governance guiding principles** to be implemented by Business and Technology
- Represent Town's **data needs** and **progress updates** at ELT forums
- Develop **monitoring and reporting activities** to derive insights and strategic decision making
- Enable **change management activities** as an enterprise priority



### Advisory

*Provide data & analytics subject matter expertise throughout Town of Oakville to enable effective use of data and realize strategic objectives and mandates. Facilitate proactive identification of data & analytics opportunities and provide ongoing change management advisory*



### Standards, Policy, & Adoption

*Establish alignment of data & analytics standards and policy based on organizational requirements, and effectively communicate the same to ensure adoption of standards and policy across businesses.*



### Monitoring & Reporting

*Provide ongoing data & analytics adoption and maturity support and advise on analytics solutions that can be leveraged centrally based on standard corporate data. Design and deliver corporate reports to derive insights and enable strategic decision making*

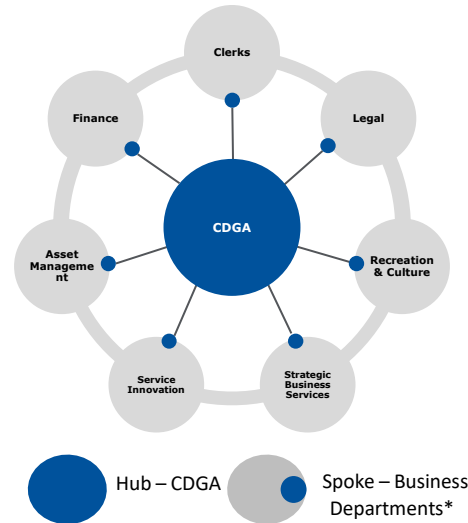
# A need for Hub and Spoke Model to enable data interactions across business/technology

To enable a successful data driven journey, the Town needs to embark on a hub and spoke data governance model that encompasses critical stakeholders who will play a key role in proliferating the data mandate throughout the Town

## Business

- **Data Governance & Management Execution:** Practitioner-level execution against data governance & management policies, standards, processes
- **Data Strategy:** Contribute and support the development & execution of the Corporate Data Strategy
- **Reporting & Analytics:** Operational groups with data practitioner resources will help with reporting & analytics needs with advisor support from the CDGA and other analytics teams
- **Use Cases and Remediation:** Business Departments will raise high-priority use cases and generate demand for issue resolution & reporting needs

\*Finance, Human Resources, Clerks, Legal, Service Innovation, Recreation & Culture, Oakville Public Library, Oakville Transit, Fire Department, Facility Services, Parks & Open Space, Roads & Works, Asset Management, Transportation & Engineering, Municipal Enforcement Services, Planning Services, Building Services, Economic Development, Strategic Business Services



## Shared Capabilities with Enabling Corporate Services & Technology

- **Data Management Policy:** Set consistent data policies and guidelines to be adhered to and adopted by the Town
- **Tools & Technology:** Drive the enterprise architecture agenda through the assessment and procurement of tooling and enablement for business departments

## Corporate Data Governance & Analytics (CDGA) Role

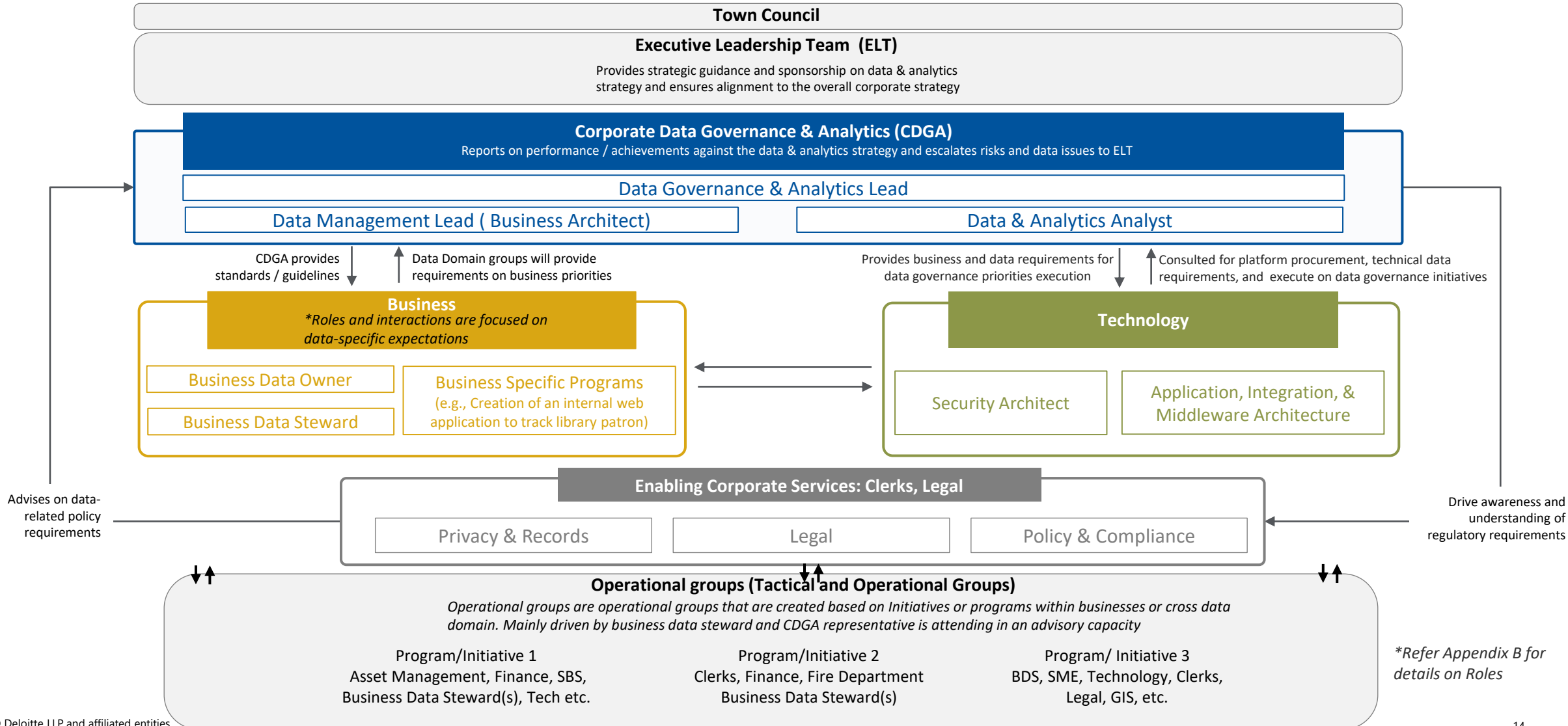
The CDGA will engage in the following interactions:

- Engage with **Business and Technology Leaders** to promote overall vision for Town's data priorities through **established governance mechanisms and forums**
- Enable **corporate data & analytics strategy** and **data governance guiding principles** to be implemented by Operational groups supported by Business and Technology
- Represent Town's **data needs** and **progress updates** at **ELT forums**
- Develop **monitoring and reporting activities** to **derive insights** and strategic decision making
- Enable **change management activities** as an enterprise priority



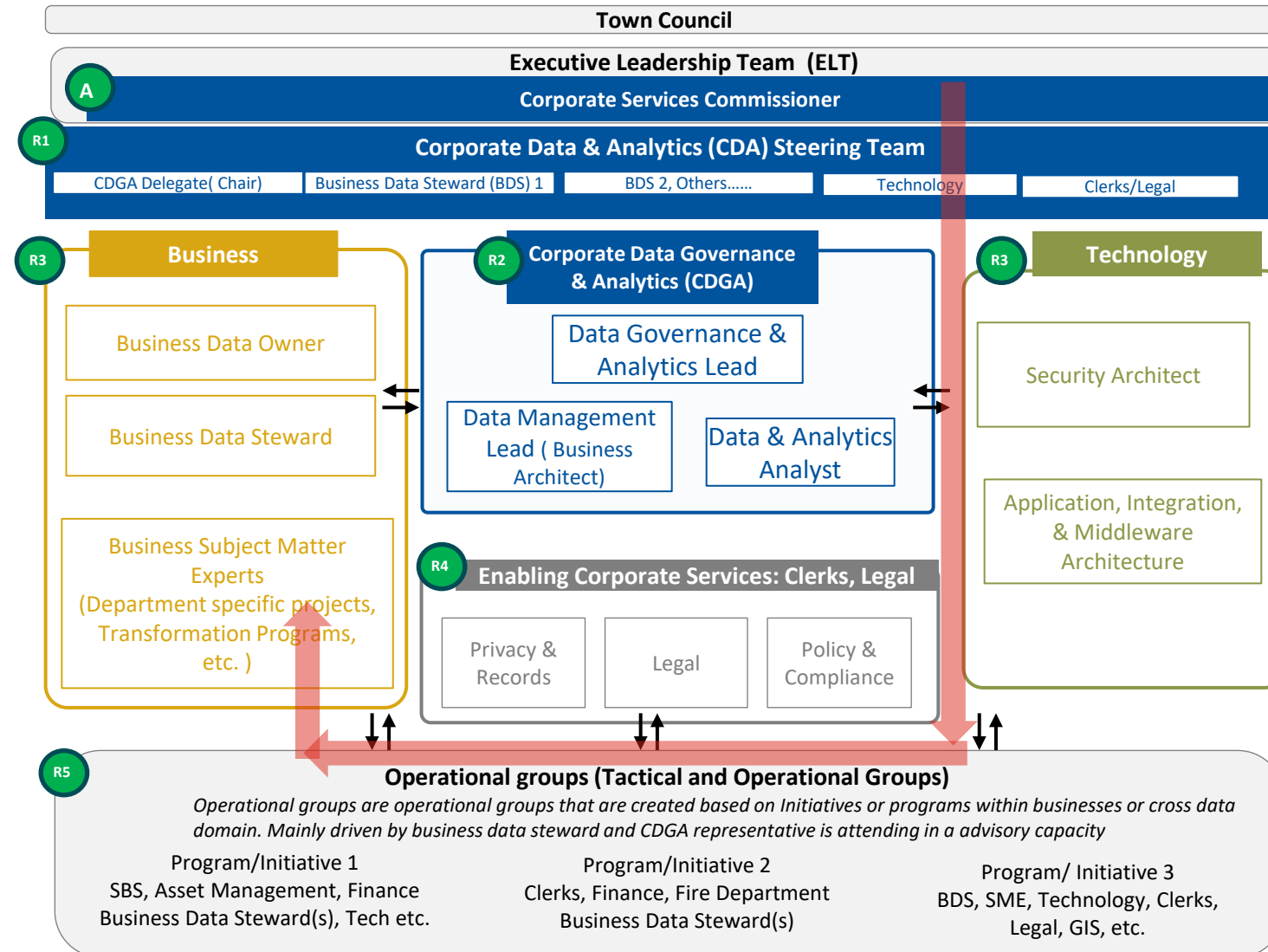
# Data Governance success will need robust Corporate-wide Engagement

To execute the operating model, key functions/departments will need to effectively interact with one another to operationalize the Town's data & analytics strategy



## 2. Enterprise Data Governance Model – high level responsibility flow

High level representation of interaction model and responsibility expectation:



Responsible



Accountable

### Operating model flow



ELT is assigned the overall accountability and oversight of Town's data driven strategy. The ELT ensures that overall data driven strategy aligns to the corporate business strategy.



**Corporate Services Commissioner** is accountable to ensure a cohesive enterprise data strategy exists and is operationalized as part of the business strategy including adequate and sufficient data capabilities are available to support enterprise needs and that risks related to data are well managed and governed.



**Corporate Data & Analytics (CDA) Steering Team** has representation across business & technology to standardize data driven decisions and prioritization and allocation of resources is optimally managed to execute the corporate data strategy. Remediations plans and decisions are brought to this group for approval.



**CDA Steering Team** is responsible to assist Corporate Services Commissioner deliver on data driven strategy mandate. Relies on **Corporate Data Governance & Analytics (CDGA)** group to ensure enterprise data strategy and decisions are business led and aligned to business strategy.



**CDGA** is responsible for the corporate data strategy to be implemented across the organization. Their mandate is to enable effective data management practices are designed and adopted leveraging leading practices. to define, oversee implementation, monitoring and change management of the strategy and ensures that required capabilities, resource allocation and adoption is progressing as expected. CDGA is a bridge between business data stewards and Data Management & Analytics Advisory Lead.



**Business Data Steward(s) and Technology** is responsible to implement and adopt the data standards and data management practices. They are responsible to collaborate with CDGA and execute on remediation initiatives as data issues gets highlighted. Business departments will have Data Stewards and SMEs at the Domain or Department level.



**Enabling Corporate Services : Clerk, Legal** are consulted to provide effective oversight/challenge to data driven programs/ initiatives and ensure that data related risks are managed and any legislative requirements are complied with.



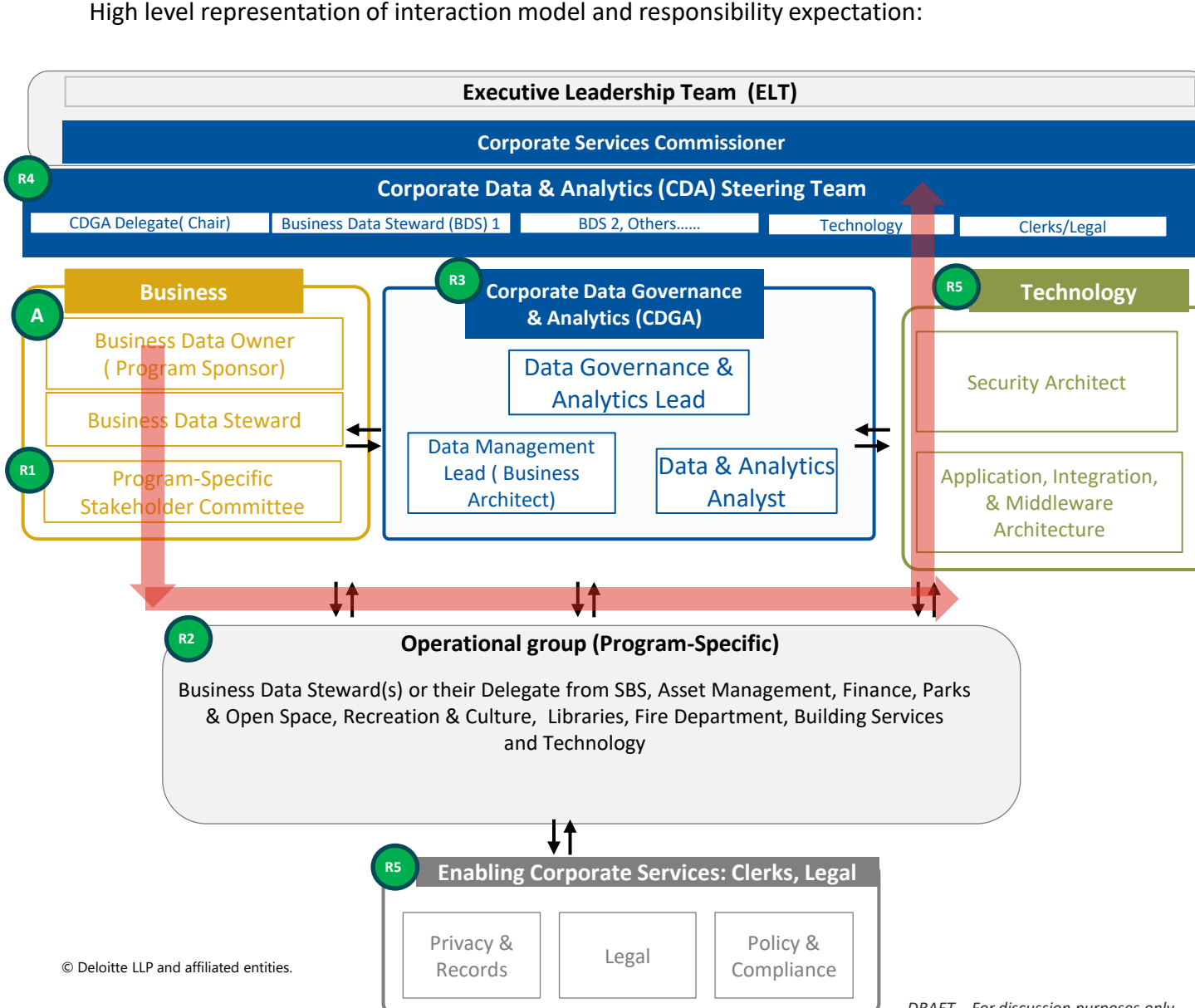
**Operational groups** are tactical; and operational, discussing data items and initiatives specific to a single business or data domain. They oversee day-to-day application of Data Governance, ensuring that policies and standards are followed within the business department or program, applying the guidance received CDGA, CDA Steering Team and ELT

## How program level governance works with Enterprise Data Governance Model

*Scenario: **Service Oakville** has initiated a program to standardize citizens street address data and effective data governance and data quality is critical for its success.*

## 2. Program level Data Governance working with Enterprise Data Governance

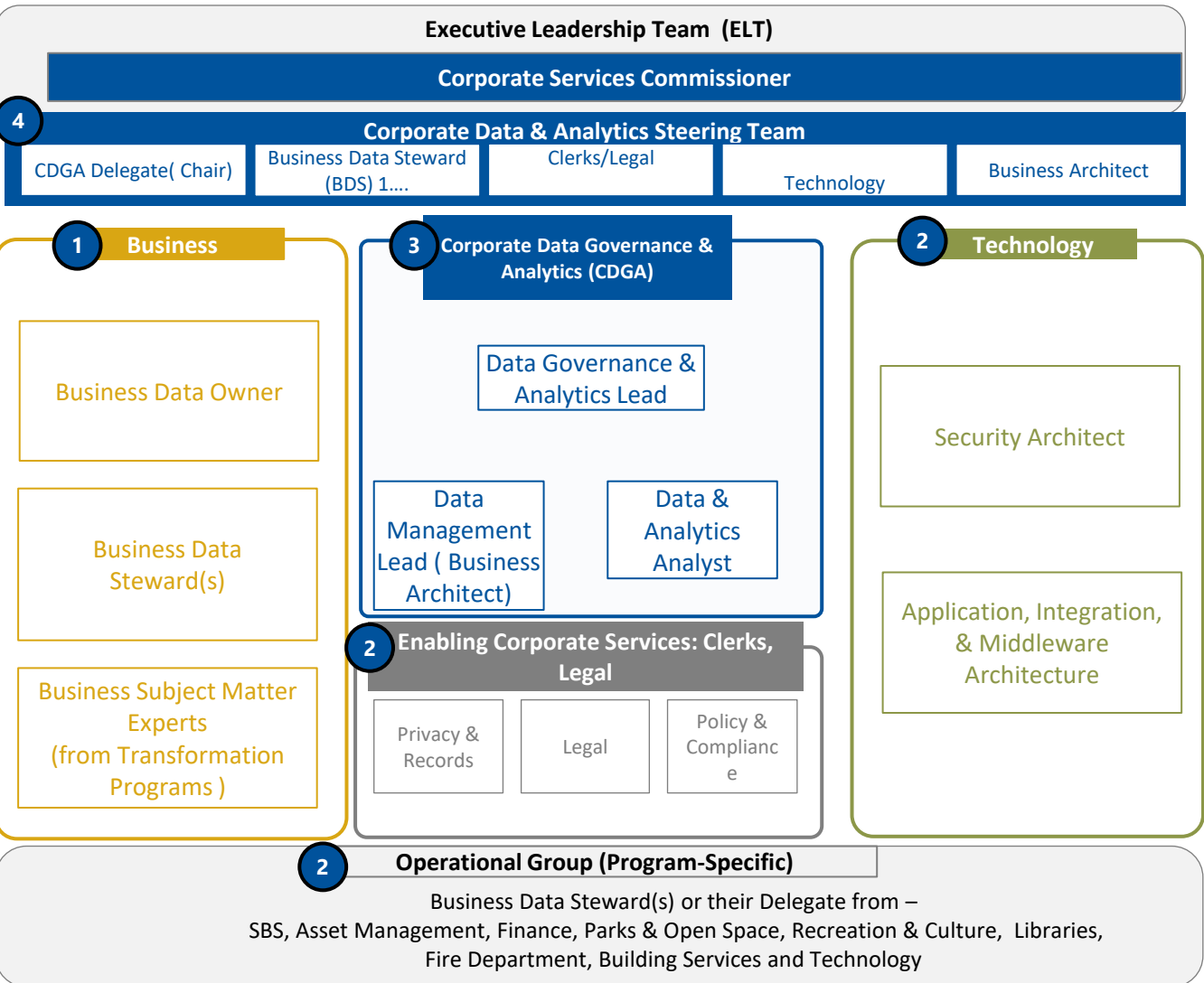
High level representation of interaction model and responsibility expectation:



- Operating model flow**
- A** **Business Data Owner** is accountable for overall Program-level data governance and is a representative (or delegate) at CDA Steering Team or ELT. Oversees the adherence to corporate level data governance and collaboratively makes high impact decisions. **Business Data Steward** executes the responsibility and acts as the first escalation point for data issues related to the program.
  - R1** **Program-Specific Stakeholder Committee** has representatives from across business departments who are responsible for making program specific decisions and ensure outcomes are achieved for the program.
  - R2** **Operational group** is the day to day tactical team that executes the program activities, is responsible to deliver outcomes within the stipulated timelines while following corporate level policies, standards and processes including data governance and data quality management. **They are responsible to engage CDGA** for advise and support and escalate issues related to data decisions.
  - R3** **CDGA** provides required level of support and advice on data governance and data quality framework to operational group. Oversees data activities and acts as an escalation point for data issues. **CDGA aggregates reporting (across programs)** and escalates to CDA Steering Team (or communicates decisions to the programs) and helps connect the dots related to data and tech decisions.
  - R4** **CDA Steering Team** reflects on data related decisions across different programs and its impact to Corporate Data Strategy and collaboratively makes high impact decisions related to data strategy or technology strategy. The CDA Steering team enables program specific decisions are aligned to corporate data strategy.
  - R5** **Technology** is embedded within operational group and at CDGA level to ensure technology related high impact decisions are aligned with business strategy. Provides technical support for data quality remediation effort, root cause analysis, master data definitions and other technology related aspects of the data priorities.
  - R5** **Enabling Corporate Services : Clerk, Legal** are consulted on data risk, PII related information, regulatory and legislative expectations are complied with.

# Scenario: Remediating data quality Issue with citizens street address data

*\*This is a sample scenario for illustration purposes only*



## Sample scenario triggers\*

Data on street addresses is **inaccurate** and **incomplete** and is required for a report within *Service Oakville*. Data quality initiative to remediate data quality issues is executed by Service Oakville on street address data.

This has implications for: **Reporting, Permits Applications, Recreational Activities Registration, Elections, etc.**

## Sample Scenario Flow

- Discover Issue**  
**Business** identifies **discrepancies/issues within its Addresses data** while creating a report for the CAO. The **working group enquire** about the issue and validate the root cause. BDS coordinates and leveraged data standards to guide the team.
- Root Cause Analysis**  
**Working Group #1** – along with **Enabling Services and Technology** – performs **root cause analysis** for data quality and identifies that the **source** of the data quality issue is not derived from CAO's office's CRM system, but rather from another system that feeds Address data into the CRM. The issue is outside of their department and needs escalation. **The issue is reported in data quality report to CDGA. An interim remediation effort is identified to move the program forward while CDGA and Technology team work on strategic remediation effort and funding.**
- CDGA Enablement**  
**CDGA aggregates and analyzes** the issues for Addresses, reflects on cross functional issues related to address data, and **navigates and uncovers** the **departments** through which the **source** of issue is derived from. **CDGA works with respective business and tech teams to develop a strategic remediation plan to mitigate the issue. The effort is estimated and brought to CD&A Steering Team for visibility and technology team takes action.**
- Remediation Plan Update/ Escalation**  
**CD&A Steering Team provides feedback and reflects on enterprise implication** given the criticality of the issue. The remediation requires **consultation from Enabling Services** on compliance, policy & standards. **Technology** executes a plan to initiative strategic solution with data controls within the application (SDLC process).

# Scenario: RACI for Data Quality Issue with External Customer Street Address Data

Scenario explained: Data on citizens’ addresses is **inaccurate** and **incomplete** and is required for a report within *CAO’s office*. CRM data is used for a critical reporting need. But inaccurate data in Addresses has implications for:

- **Reporting, Permits Applications, Recreational Activities Registration, Elections, etc.**

**Operational Group** is made up of **Business Data Steward(s)** from business departments, CAO’ Office, SBS, Privacy & Records Specialist, Application Architect and CDGA Lead

**\*\*Business Data Steward** role will vary depending on the data domain ownerships

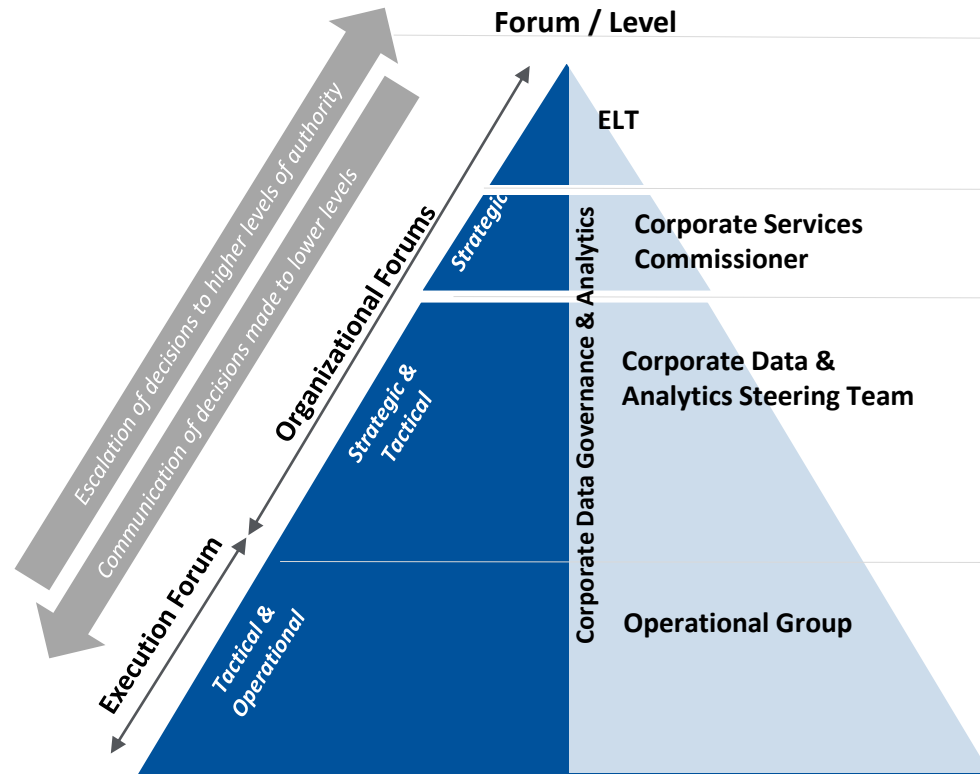
| Process                                                         | Activities                                                                                            | CDGA Lead | Operational Group | Business Data Steward** | Technology | Enabling Services | CD&A steering Team |
|-----------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|-----------|-------------------|-------------------------|------------|-------------------|--------------------|
| Data Quality of Addresses PoC - Data Quality & Issue Management | Perform data quality assessment on address data (business impact, data requirements, and application) | C/I       | R                 | A/R                     | C/I        | I                 | NA                 |
|                                                                 | Analyze data quality issue and assess validity                                                        | I         | R                 | A/R                     | I          | I                 | NA                 |
|                                                                 | Investigate root cause – people, process, technology issue                                            | C         | R                 | A/R                     | R          | I                 | NA                 |
|                                                                 | Identify possible remediation options                                                                 | C         | R                 | A/R                     | R          | I                 | NA                 |
|                                                                 | Execute on remediation activities                                                                     | C         | R                 | A                       | R          | C/I               | NA                 |
|                                                                 | Assess data quality issue impact on technology/tool decision (CRM)                                    | R         | C                 | R                       | A          | C                 | I                  |
|                                                                 | Aggregate and report on data quality exposure at corporate level – data quality dashboard             | A/R       | C                 | C                       | R          | C                 | I                  |
|                                                                 | Provide corporate level update due to the impacted change and provide training support                | A         | I                 | I                       | C/I        | I                 | I                  |

R → Responsible | A → Accountable | C → Consulted | I → Informed

*\*Refer Appendix B for definition on RACI*

# Corporate Data Governance & Analytics – Decision making forums

Decision making is distributed across the governance tiers to ensure significant risks are visible, while managing smaller risks at operational levels



## Overview

1. **ELT** is accountable for:
  - Oversight of Town's data strategy and for making the highest impact decisions for the Town
  - ELT has data as a key part to their mandate and ensure that overall strategic decisions align to corporate business strategy
2. **Corporate Services Commissioner** is accountable for:
  - **Championing data strategy definition & operationalization** and for prioritizing data management issues to be escalated to ELT
3. **Corporate Data & Analytics Steering Team** is responsible for:
  - Making **strategic data decisions** and **resolving certain escalated issues** that impact more than one business departments at an operational level
  - Facilitating **collaboration for data initiatives and issues** across the functions (e.g., data source issues, data collection enhancements, etc.)
  - Overseeing **data initiatives and programs** to ensure data goals are met from inception to execution
4. **Operational Group** is responsible for:
  - Discussing **data initiatives and problems** highlighted from departments pertaining to either single business department or across data domains (cross functional groups)
  - Overseeing day-to-day application of Data Governance within their business departments
  - Ensuring that **policy and standards** created are **followed** across the Town
  - **Applying the guidance** received from ELT, CDGA, and CDGA Steering Team

## We Recommend Town to:



### Establish a net new Corporate Data & Analytics Steering Team

The Steering Team with its cross-functional representation will be responsible to assist Corporate Services Commissioner deliver on data strategy mandate & ensure CDGA decisions are aligned to Town's overall data vision guiding principles

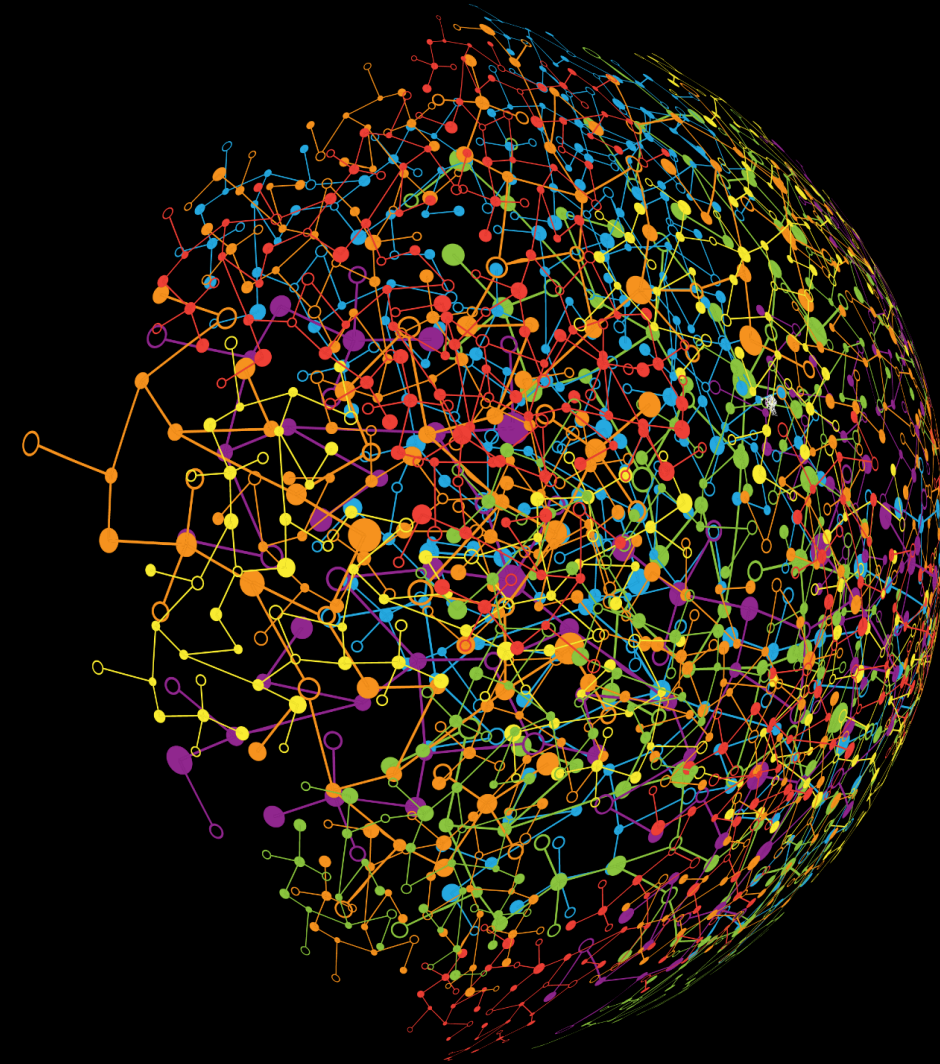


### Consider if SLT's Mandate can be expanded to include Corporate Data Governance decisions

Town needs to assess the current mandate and cross-functional representation within SLT to potentially act as Corporate Data & Analytics Steering Team in the long term.

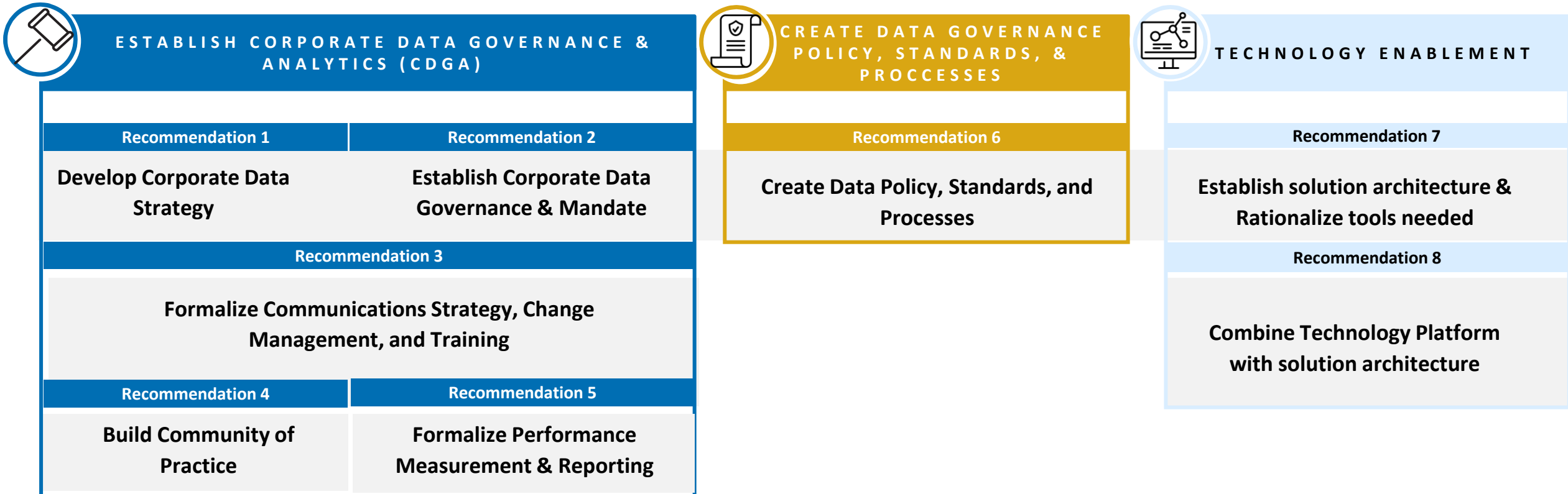


## How to embark on Data Governance journey for Town of Oakville ?



# Summary of Corporate Data Management Strategy Recommendations

Based on the ongoing discussions with the Town stakeholders and being cognizant of the current state maturity level of the Town's data capabilities, below are the proposed critical steps that are required to move Town of Oakville from the reactive to managed stage



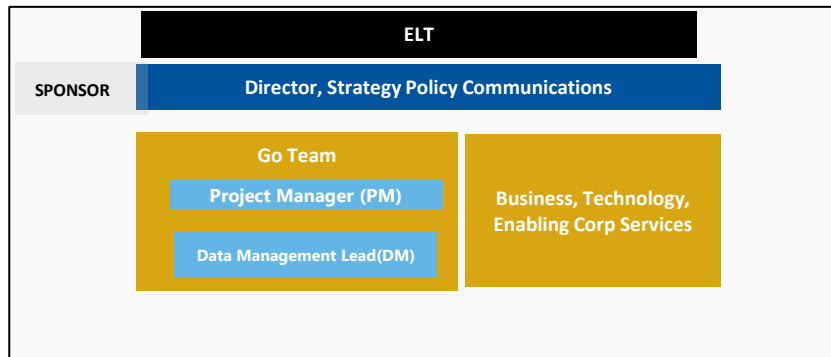
# Evolution of Corporate Data Governance - Roles & Reporting Structure

## Short-term

### Foundations and Pilot:

- **Define & Establish Corporate Data Strategy. Identify & determine PoC requirements** based on strategic direction. Define **data domain ownership** structure.
- Perform **skills gap assessment** to efficiently allocate resources for PoC. Stand-up **PMO led Go Team** and CDGA function resource needs.
- **Execute PoC .Define required data policies & standards** based on target state corporate **solution architecture** and **rationalized tools**.

- **The Go Team** will play a key role in formalizing Governance mandate during short term and leading the PoC.
- Director, Strategy Policy Communications (SPC) will act as **Sponsor** for the PoC, and report **progress**. Support **transition to Commissioner, Corporate Services**

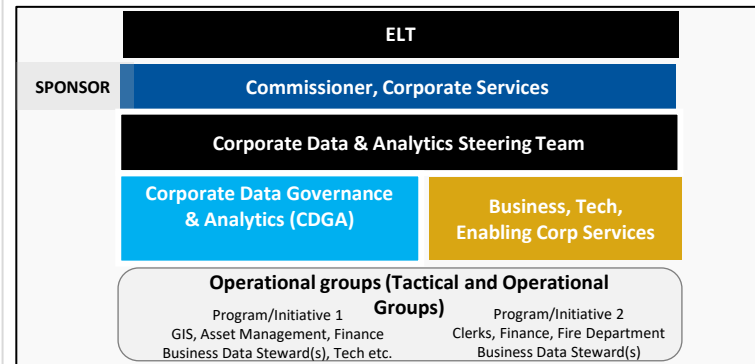


## Mid-term

### Expand the focus:

- Formalize and Socialize CDGA Function and identify remaining data domain ownerships
- **Evolve** the short-term & embed data governance within business initiatives. **Initiate** additional capabilities development & adoption through business initiatives.
- **Standardize** Technology architecture ,tools and **evaluate** requirements for governance **platform**.

- The Go Team will **transition into Corporate Data & Analytics Team** with cross-functional representation to execute strategic data decisions, allocate resources etc.
- **Commissioner, Corporate Services and Corporate Data Governance & Analytics ( CDGA)** team will be leading the implementation of Corporate data strategy across Town.

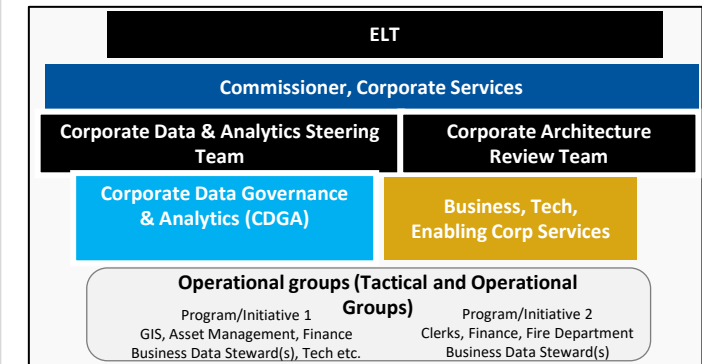


## Long-term

### Institutionalize and Scale:

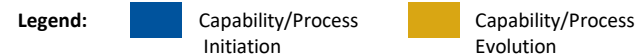
- **Evolve all mid-term** data management capabilities.
- Focus on **full-scale institutionalization** and **scaling** of Hub & Spoke model across the Town.
- Initiate full-scale **Business Intelligence & Analytics** capability across Town.
- **Implement** data governance **platform**.

- Commissioner, Corporate Services will have the overall corporate Data Strategy **accountability**.
- **CDGA** will now mature and fulfill its advisory and enablement responsibilities **aligned with Technology strategy**.
- Net-new **Corporate Architecture Review** team will be established for technical advisory to Steering Team



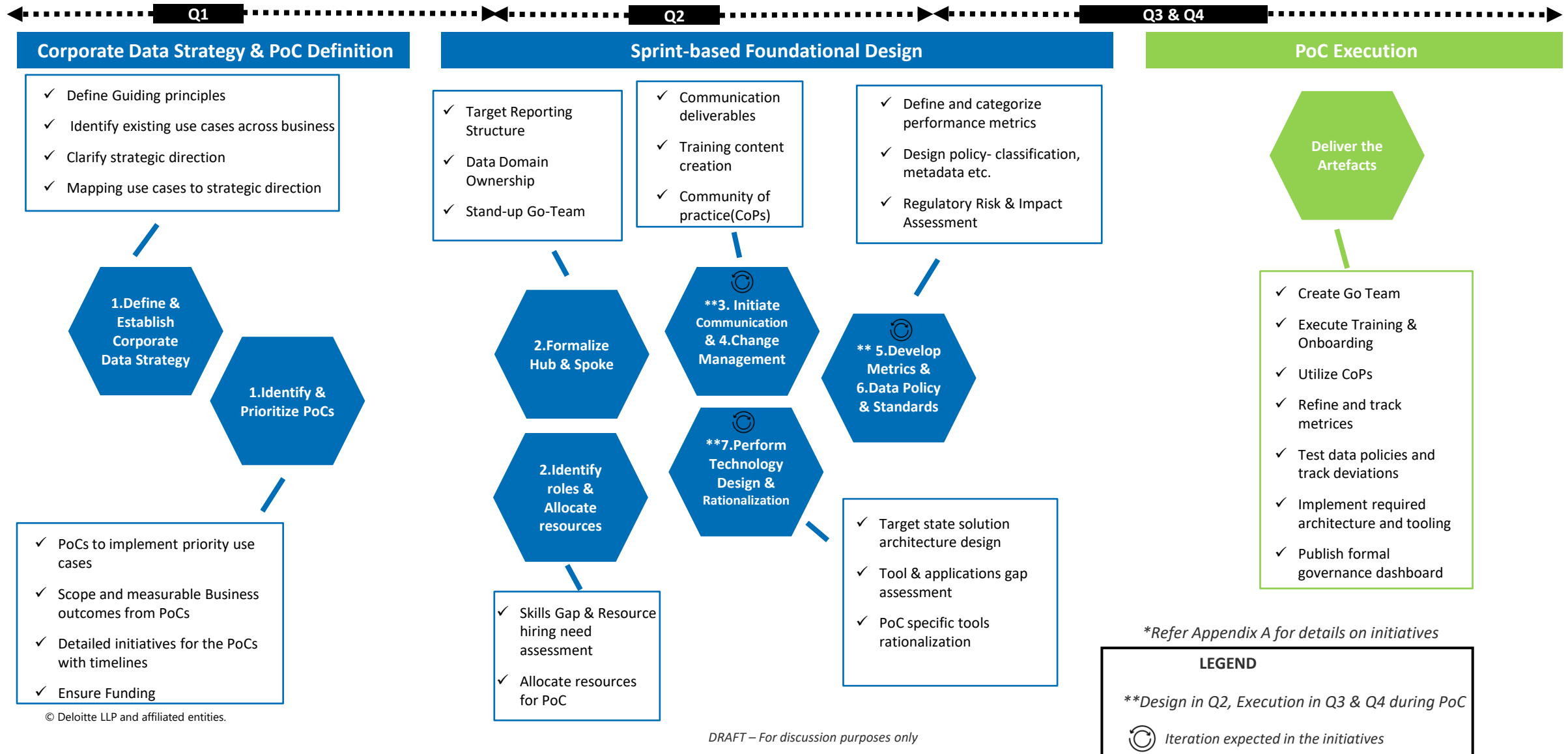
**Short Term**  
**(Addresses as Data Domain)**  
*(0 - 12 Months)★*

### Long Term (Defined Teams) (25 - 36 Months)★



# Key Next Steps for Embarking on Corporate Data Strategy- Short term

A timeline view of the Immediate Next Steps for the Town of Oakville to embark on the Corporate Data governance journey



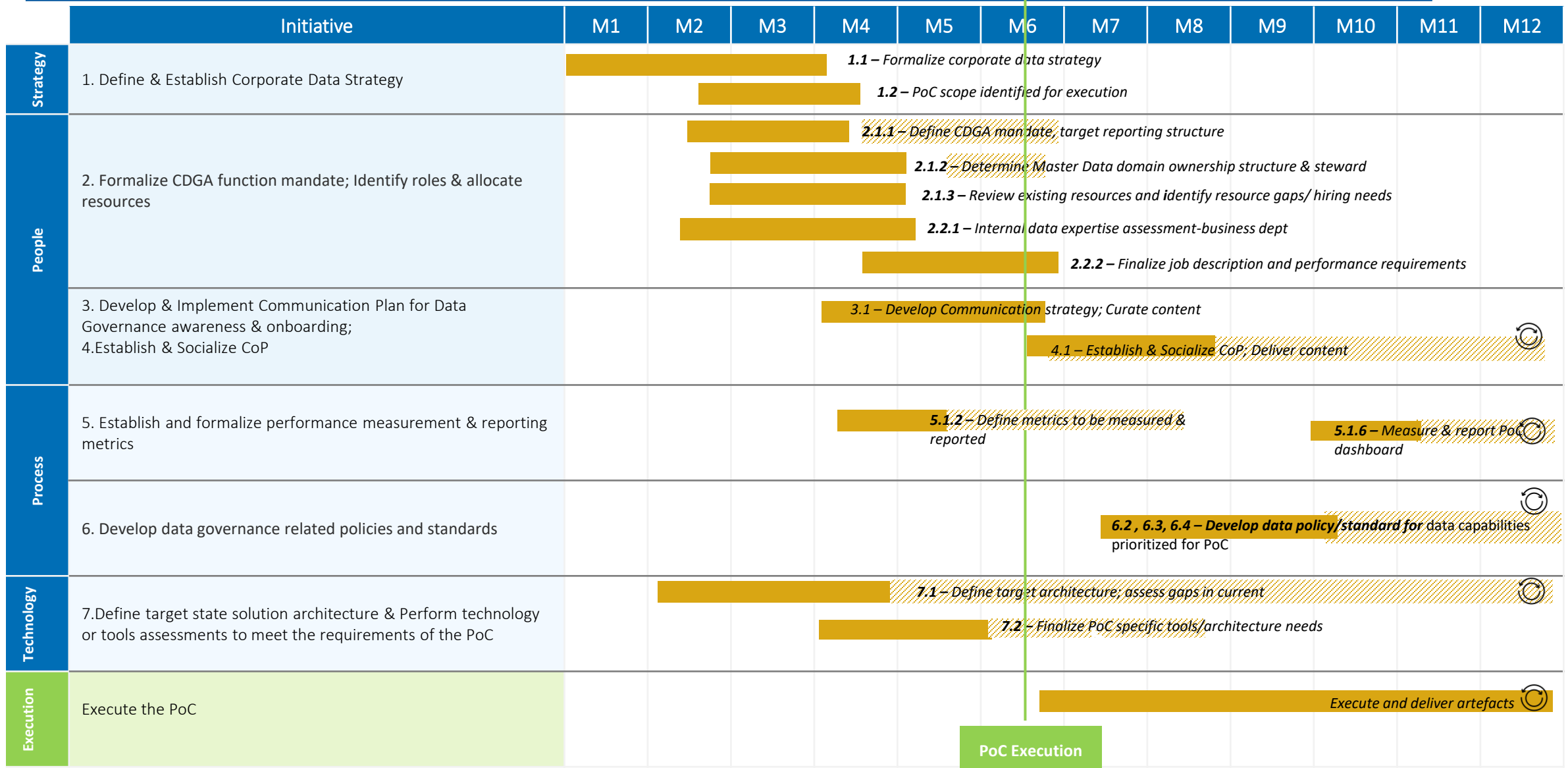
# Short Term Initiatives – Detailed Timeline Roadmap

\*Timelines could be extended without External Support

\*Timelines assume Resource & Skill availability as well as overall support



OAKVILLE



# Key Roles and Resource Requirements for Short Term

A high-level summarized view of Town's resources is shown below which **expects delivery of short-term initiatives through External support ( Consultants)**. Engagement from Business Leaders/Stewards from each department will need to adjusted based on PoC scope. Certain Roles (marked \*) across Business, CDGA and Technology need assessment on whether existing resources can be used, or New Hires will be needed. *For details of the role involvement in Short-term initiatives refer Appendix A.*

| ELT ( Available for attending review workshops- PT 5%)                                                          |                     |                                                                                                                                          |                     |                                                                                                                                         |                     |
|-----------------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Business                                                                                                        |                     | Corporate Data Governance & Analytics (CDGA)                                                                                             |                     | Technology                                                                                                                              |                     |
| Roles                                                                                                           | Average Involvement | Roles                                                                                                                                    | Average Involvement | Roles                                                                                                                                   | Average Involvement |
| <br>Business Leaders /Managers | PT (20%)            | <br>SPC Director / Manager                            | 1 FT(>70%)          | <br>Application, Integration & Middleware Architect* | 1 FT(>70%)          |
| <br>Business Data Owner*       | PT (20%)            | <br>Data Governance & Analytics Lead *                | 1 FT                |                                                                                                                                         |                     |
|                                                                                                                 |                     | <br>Data Management Lead ( a.k.a Business Architect)* | 1 FT                |                                                                                                                                         |                     |

PT = part time resource(s), FT = full time resource(s)

PT = part time resource(s), FT = full time resource(s)

| Corporate Services: Clerks, Legal                                                                                     |                     | Human Resources and Communications                                                                                               |                     |
|-----------------------------------------------------------------------------------------------------------------------|---------------------|----------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Roles                                                                                                                 | Average Involvement | Roles                                                                                                                            | Average Involvement |
| <br>Policy & Compliance Specialist | 1 FT(>70%)          | <br>Human Resources and Communications Team | PT(10-20%)          |
| <br>Privacy & Records Specialist   | 1 PT(20%)           |                                                                                                                                  |                     |

*\*Refer Appendix B for details on Roles*



# Appendix A – Short Term Initiatives Tear Sheets

# Short Term Initiatives- Tear Sheet

Detailed Immediate Next Steps – Initiative 1.1 Formalize Corporate data strategy to support Town’s data vision ; Initiative 1.2 Identify existing programs/transformations that can be leveraged to execute on the data strategy. Prioritize and determine PoC to execute and operationalize the data strategy

| Initiative Description | Define & Establish Corporate Data Strategy and determine PoC scope to operationalize the data strategy |                  |                                                                      |
|------------------------|--------------------------------------------------------------------------------------------------------|------------------|----------------------------------------------------------------------|
| Primary Owner (\$)     | Strategy, Policy & Communications (SPC)                                                                | Support Owner(s) | Business Departments, Technology, Corporate Services (Clerks, Legal) |

**Note:** The estimates for costs and resourcing are generic estimates which do not account for synergies that may be achieved in delivering these initiatives for Town.

| High-level Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Stakeholder Groups                                                                                                                                                                                            |                                                                                                         |             |                     |          |                           |                |           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|-------------|---------------------|----------|---------------------------|----------------|-----------|
| <u>Initiative 1.1</u><br>1.1.1 – Formalize corporate data strategy to support Town’s data vision in alignment with internal & external stakeholders<br>1.1.2 – Socialize and refine the strategy and align to business priorities<br><u>Initiative 1.2</u><br>1.2.1 – Identify existing key efforts related to data & analytics attribute across Corporate and business departments<br>1.2.2 – Map existing key efforts to data & analytics capabilities and strategic directions<br>1.2.3 – Prioritize the mapped use cases as per the strategic directions, business priorities and set measurable PoC expectations | <ul style="list-style-type: none"> <li>ELT</li> <li>Commissions/Business Leaders (Community Services/ Infrastructure/ Development)</li> <li>Corporate Services (Clerks, Legal)</li> <li>Technology</li> </ul> |                                                                                                         |             |                     |          |                           |                |           |
| Dependencies                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Directional Estimates                                                                                                                                                                                         |                                                                                                         |             |                     |          |                           |                |           |
| Business Dependencies-                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <table> <tr> <th>Description</th><th>High-level Estimate</th><th>Duration</th></tr> <tr> <td>External/Internal Support</td><td>\$200 - \$250k</td><td>~3 months</td></tr> </table>                            |                                                                                                         | Description | High-level Estimate | Duration | External/Internal Support | \$200 - \$250k | ~3 months |
| Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | High-level Estimate                                                                                                                                                                                           | Duration                                                                                                |             |                     |          |                           |                |           |
| External/Internal Support                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | \$200 - \$250k                                                                                                                                                                                                | ~3 months                                                                                               |             |                     |          |                           |                |           |
| <ul style="list-style-type: none"> <li>Senior leadership buy-in to confirm priorities and drive the strategy forward</li> <li>Engagement and Socialization with Senior Executive to ensure alignment at the business strategy level and their role in funding/decisions</li> </ul>                                                                                                                                                                                                                                                                                                                                    | Town Resource Requirements (Town staff involvement)                                                                                                                                                           |                                                                                                         |             |                     |          |                           |                |           |
| Benefits/ Value Proposition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Resource Type                                                                                                                                                                                                 | Effort Type                                                                                             |             |                     |          |                           |                |           |
| <ul style="list-style-type: none"> <li>Prioritized Corporate data strategy</li> <li>Aligned on PoC scope including which data management capabilities and data domains for PoC</li> <li>Aligned on Business outcomes that will be achieved and measured to execute PoC</li> </ul>                                                                                                                                                                                                                                                                                                                                     | ELT<br>Business Leaders*<br>Technology<br>Corporate Services (Clerks, Legal)<br>SPC Director/ Advisor ( Project Lead)                                                                                         | Available for attending review workshops(5%)<br>1 – 2 PT (20%)<br>1 PT (20%)<br>1 PT(20%)<br>1 PT (40%) |             |                     |          |                           |                |           |

**Assumptions:**

- External Support contracted to help define a corporate data governance strategy, requirements include stakeholder interviews and workshops
- Engagement from Business Leaders from each department\*
- Activities can be done in parallel with Defining CDGA Function mandate and Defining target state solution architecture

PT = part time resource(s), FT = full time resource(s)

# Short Term Initiatives- Tear Sheet Cont'd

Detailed Immediate Next Steps – Initiative 2.1 Formalize and stand-up the CDGA and define how functional responsibilities will be delivered ; Initiative 2.2 Operationalize Corporate Data Governance through CDGA for strategic business outcomes

|                               |                                                                                                                     |                         |                                                                     |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------|-------------------------|---------------------------------------------------------------------|
| <b>Initiative Description</b> | Formalize CDGA function mandate and Operationalize Data governance mandate by standing up CDGA as PMO in short term |                         |                                                                     |
| <b>Primary Owner (\$)</b>     | Strategy, Policy & Communications (SPC)                                                                             | <b>Support Owner(s)</b> | Business Departments, Technology, Corporate Services(Clerks, Legal) |

**Note:** The estimates for costs and resourcing are generic estimates which do not account for synergies that may be achieved in delivering these initiatives for Town.

| High-level Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Stakeholder Groups                                                                                                                                                                                                              |                                              |                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|-------------------------------|
| <u>Initiative 2.1</u><br>2.1.1 –Aligned to Corporate Data Strategy, define CDGA mandate and short-term and target state reporting structure<br>2.1.2 –Determine master data domain ownership structure with business data steward identified for business department<br>2.1.3 –Review existing resources and identify resources who will be part of CDGA function – determine gaps and need to hire<br>2.1.5 – Determine sustainable roadmap and priorities for medium-long term, based on learnings from short term | <ul style="list-style-type: none"><li>Commissions/Business Leaders (Community Services/ Infrastructure/ Development)</li><li>ELT</li><li>Human Resources</li><li>Technology</li><li>Corporate Services(Clerks, Legal)</li></ul> |                                              |                               |
| <u>Initiative 2.2</u><br>2.2.1 –Perform gap assessment and requirements of data expertise, data capabilities within each business department<br>2.2.2 –Determine job description & performance requirements<br>2.2.3 – Stand up CDGA as PMO in short-term and clarify role to deliver on PoC scope                                                                                                                                                                                                                   |                                                                                                                                                                                                                                 |                                              |                               |
| Dependencies                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Directional Estimates*                                                                                                                                                                                                          |                                              |                               |
| Initiative Dependencies –<br>1.1 –Formalize Corporate data strategy to support Town’s data vision<br>1.2 –Identify existing programs/transformations that can be leveraged to execute on the data strategy. Prioritize and determine PoC to execute and operationalize the data strategy                                                                                                                                                                                                                             | Description                                                                                                                                                                                                                     | High-level Estimate                          | Duration for External Support |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | External/Internal Support                                                                                                                                                                                                       | ~ \$500 - 600k                               | ~4 Months                     |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | *The Directional estimates overlap with Initiatives 2.3 and 2.4 ( next slide)                                                                                                                                                   |                                              |                               |
| Benefits/ Value Proposition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Town Resource Requirements (Town staff involvement)                                                                                                                                                                             |                                              |                               |
| <ul style="list-style-type: none"><li>Allocate required Working group roles as needed for PoC</li><li>Understanding of current data capabilities and socialized role mandate</li></ul>                                                                                                                                                                                                                                                                                                                               | Resource Type                                                                                                                                                                                                                   | Effort Type                                  |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Business Leaders/Managers*                                                                                                                                                                                                      | 2-3 PT(30%)                                  |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | ELT                                                                                                                                                                                                                             | Available for attending review workshops(5%) |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Human Resources                                                                                                                                                                                                                 | 1 PT (10%)                                   |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Technology                                                                                                                                                                                                                      | 1 PT(30%)                                    |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Corporate Services(Clerks, Legal)                                                                                                                                                                                               | 1 PT(30%)                                    |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | SPC Director/ Advisor ( Project Lead)                                                                                                                                                                                           | 1 PT (40%)                                   |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | PT = part time resource(s), FT = full time resource(s)                                                                                                                                                                          |                                              |                               |

| Dependencies                                                                                                                                                                                                                                                                             |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Initiative Dependencies –<br>1.1 –Formalize Corporate data strategy to support Town’s data vision<br>1.2 –Identify existing programs/transformations that can be leveraged to execute on the data strategy. Prioritize and determine PoC to execute and operationalize the data strategy |
| Benefits/ Value Proposition                                                                                                                                                                                                                                                              |
| <ul style="list-style-type: none"> <li>Allocate required Working group roles as needed for PoC</li> <li>Understanding of current data capabilities and socialized role mandate</li> </ul>                                                                                                |

**Assumptions:**

- Engagement from Business Leaders from each department\* . Provide active support in data skills & capabilities gap assessment
- Activities can be done in parallel with Defining Data Strategy and Defining target state solution architecture

# Short Term Initiatives- Tear Sheet Cont'd

Detailed Immediate Next Steps – Initiative 2.3 Formalize and clarify role existing committees in data decision making starting with existing ongoing initiatives; Initiative 2.4 Clarify CDGA engagement model with Business, Technology and Enabling Corporate Services ( Clerks, Legal)

|                               |                                                                                                                           |                         |                                                                     |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------|-------------------------|---------------------------------------------------------------------|
| <b>Initiative Description</b> | Formalize engagement model and clarify role of existing committees & Directors/Commissioners in the CDGA engagement model |                         |                                                                     |
| <b>Primary Owner (\$)</b>     | Strategy, Policy & Communications (SPC)                                                                                   | <b>Support Owner(s)</b> | Business Departments, Technology, Corporate Services(Clerks, Legal) |

**Note:** The estimates for costs and resourcing are generic estimates which do not account for synergies that may be achieved in delivering these initiatives for Town.

| High-level Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Stakeholder Groups                                                                                                                                                                                                              |                                                                                                                                                                                        |                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <u>Initiative 2.3</u><br>2.3.1 – Consult with Business, Technology and Enabling Corporate Services to understand data needs and requirements in the short-medium-long term<br>2.3.2 – Enhance/align existing committees’ responsibilities to facilitate effective data decision making<br>2.3.3 – Consult and socialize proposed engagement model with business stewards, Business SMEs, and 2nd & 3rd Line Functions to clearly define their roles and mandates<br>2.3.4 – Onboard Directors using a defined organizational change management plan to clearly communicate their role in data decision making & standup Corporate Data & Analytics Steering Team<br><u>Initiative 2.4</u><br>2.4.1 – Clarify the role of Commissioners in driving and effectively operationalizing strategy<br>2.4.2 – Define and finalize engagement model between CDGA, Technology, Business and Enabling Corporate Services | <ul style="list-style-type: none"><li>Commissions/Business Leaders (Community Services/ Infrastructure/ Development)</li><li>ELT</li><li>Human Resources</li><li>Technology</li><li>Corporate Services(Clerks, Legal)</li></ul> |                                                                                                                                                                                        |                               |
| Directional Estimates*                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                 |                                                                                                                                                                                        |                               |
| Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                 | High-level Estimate                                                                                                                                                                    | Duration for External Support |
| External/Internal Support                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                 | N/A                                                                                                                                                                                    | ~4 Months                     |
| *The Directional estimates overlap with Initiatives 2.1 and 2.2 ( previous slide)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                 |                                                                                                                                                                                        |                               |
| Town Resource Requirements (Town staff involvement)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                 |                                                                                                                                                                                        |                               |
| Resource Type                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                 | Effort Type                                                                                                                                                                            |                               |
| Business Leaders*                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                 | 2-3 PT (30%)                                                                                                                                                                           |                               |
| ELT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                 | Available for attending review workshops(5%)                                                                                                                                           |                               |
| Human Resources                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                 | 1 PT (10%)                                                                                                                                                                             |                               |
| Corporate Services(Clerks, Legal)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                 | 1 PT (30%)                                                                                                                                                                             |                               |
| Technology                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                 | 1 PT (10%)                                                                                                                                                                             |                               |
| SPC Director/ Advisor ( Project Lead)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                 | 1 PT (40 %)                                                                                                                                                                            |                               |
| Assumptions:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                 | PT = part time resource(s), FT = full time resource(s)                                                                                                                                 |                               |
| Dependencies                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                 | Benefits/ Value Proposition                                                                                                                                                            |                               |
| Initiative Dependencies –<br>2.1.2 –Determine master data domain ownership structure with business data steward identified for business department<br>2.2.3 – Stand up CDGA as PMO in short-term and clarify role to deliver on PoC scope                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                 | <ul style="list-style-type: none"><li>Allocate required Working group roles as needed for PoC</li><li>Understanding of current data capabilities and socialized role mandate</li></ul> |                               |

# Short Term Initiatives- Tear Sheet Cont'd

Detailed Immediate Next Steps – Initiative 3.1 Develop Communication Plan for Data Governance Awareness; Initiative 3.2 Develop Change Management Action Plan; Initiative 3.3 Monitor new talent and skill requirements

|                               |                                                                             |                         |                                      |
|-------------------------------|-----------------------------------------------------------------------------|-------------------------|--------------------------------------|
| <b>Initiative Description</b> | Develop Communication and Change management action plan for Data Governance |                         |                                      |
| <b>Primary Owner (\$)</b>     | CDGA (Corporate Data Governance and Analytics )                             | <b>Support Owner(s)</b> | Communications Team, Human Resources |

**Note:** The estimates for costs and resourcing are generic estimates which do not account for synergies that may be achieved in delivering these initiatives for Town.

| High-level Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Stakeholder Groups                                                                                                                                                                                                                              |                               |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|--|
| <u>Initiative 3.1</u><br>3.1.1 – Assess and Outline the overall communication approach, guiding principles, governance model, and communication deliverables that build awareness and ownership for strategic change efforts<br>3.1.2 – Establish communication deliverables that build awareness and ownership for strategic change efforts<br>3.1.3 – Create a detailed action plan outlining delivery methods ( emails, newsletters etc.)<br><u>Initiative 3.2</u><br>3.2.3 – Create a detailed change management action plan outlining communication methods<br><u>Initiative 3.3</u><br>3.3.2 – Create demand based and Town specific data domain-based ongoing training contents to ensure that the strategic initiatives are understood and implemented by various Operational groups | <ul style="list-style-type: none"><li>Commissions/Business Leaders (Community Services/ Infrastructure/ Development)</li><li>Human Resources</li><li>Technology</li><li>Corporate Services(Clerks, Legal)</li><li>Communications Team</li></ul> |                               |  |
| Directional Estimates                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                 |                               |  |
| Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | High-level Estimate                                                                                                                                                                                                                             | Duration for External Support |  |
| External/Internal Support                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | ~ \$150k                                                                                                                                                                                                                                        | <2 Months                     |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                 |                               |  |
| Town Resource Requirements (Town staff involvement)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                 |                               |  |
| Resource Type                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                 | Effort Type                   |  |
| CDGA ( Project Lead)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                 | 1 FT (>70%)                   |  |
| Business Leaders*                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                 | 1 PT (10%)                    |  |
| Communications Team                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                 | 1 PT (30%)                    |  |
| Technology                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                 | 1 PT (5 %)                    |  |
| Human Resources                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                 | 1 PT (10%)                    |  |
| PT = part time resource(s), FT = full time resource(s)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                 |                               |  |
| <b>Assumptions:</b> <ul style="list-style-type: none"><li>Formalized Communication Plan with messaging top-down coming from Senior Executives to their respective business lines</li><li>Transition plan for onboarding roles/ knowledge transfer to the mid-term team</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                 |                               |  |
| Dependencies                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Initiative Dependency-<br>2.2.3 – Stand up CDGA as PMO in short-term and clarify role to deliver on PoC scope<br>2.4.2 – Define and finalize engagement model between CDGA, Technology, Business and Enabling Corporate Services                |                               |  |
| Benefits/ Value Proposition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                 |                               |  |
| <ul style="list-style-type: none"><li>Curated content on governance PoC requirements</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                 |                               |  |

# Short Term Initiatives- Tear Sheet Cont'd

Detailed Immediate Next Steps – Initiative 4.1 Define the responsibilities and measurable outcomes recommended from the Data Governance Community of Practice to support current initiatives; Initiative 4.2 Enable CDGA led Functional Model for the CoP and required stakeholder capabilities

|                               |                                                                                                               |                         |                                   |
|-------------------------------|---------------------------------------------------------------------------------------------------------------|-------------------------|-----------------------------------|
| <b>Initiative Description</b> | Define and implement Community of Practice (CoP) expectations, target audience persona and delivery logistics |                         |                                   |
| <b>Primary Owner (\$)</b>     | CDGA (Corporate Data Governance and Analytics )                                                               | <b>Support Owner(s)</b> | Corporate Services(Clerks, Legal) |

**Note:** The estimates for costs and resourcing are generic estimates which do not account for synergies that may be achieved in delivering these initiatives for Town.

| High-level Activities                                                                                                                                                                                                                                                                                                                                                                                                                     | Stakeholder Groups                                                                                                                                                                                                                                                                                                                   |                     |                               |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------------------------|
| <u>Initiative 4.1</u><br>4.1.1 – Assess and Outline the overall responsibility and expectations from CoPs and ensure adoption across Town<br>4.1.2 – Suggest recommendations into the persona of the CoP, including target audience, its frequency, external speakers etc.                                                                                                                                                                | <ul style="list-style-type: none"><li>Commissions/Business Leaders (Community Services/ Infrastructure/ Development)</li><li>Business Data Stewards</li><li>Technology</li><li>Corporate Services(Clerks, Legal)</li></ul>                                                                                                           |                     |                               |
| <u>Initiative 4.2</u><br>4.2.1 – Identify, define and socialize the CDGA led delivery model & logistics for CoPs ( online/ in-person)<br>4.2.2 – Ensure key stakeholder alignment to contribute towards CoPs outcomes along with their current governance initiatives and track progress<br>4.2.3 – Identify members to maintain an ongoing plan outlining topics/issues discussed and share it to Town leadership ( CDGA, ELT) as needed |                                                                                                                                                                                                                                                                                                                                      |                     |                               |
| Dependencies                                                                                                                                                                                                                                                                                                                                                                                                                              | Directional Estimates                                                                                                                                                                                                                                                                                                                |                     |                               |
| Initiative Dependency-<br>2.4.2 – Define and finalize engagement model between CDGA, Technology, Business and Enabling Corporate Services<br>3.1.1 – Assess and Outline the overall communication approach, guiding principles                                                                                                                                                                                                            | Description                                                                                                                                                                                                                                                                                                                          | High-level Estimate | Duration for External Support |
|                                                                                                                                                                                                                                                                                                                                                                                                                                           | External/Internal Support                                                                                                                                                                                                                                                                                                            | ~ \$150k            | 2 Months                      |
| Benefits/ Value Proposition                                                                                                                                                                                                                                                                                                                                                                                                               | Town Resource Requirements (Town staff involvement)                                                                                                                                                                                                                                                                                  |                     |                               |
| <ul style="list-style-type: none"><li>Conducted two onboarding sessions completed for selected individuals/team</li><li>Communicate &amp; socialize CoP via emails ,newsletters periodically</li><li>Knowledge transferred to the business for mid/long-term</li></ul>                                                                                                                                                                    | Resource Type                                                                                                                                                                                                                                                                                                                        | Effort Type         |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                           | CDGA( Project Lead)                                                                                                                                                                                                                                                                                                                  | 1 FT (>70%)         |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                           | Business*                                                                                                                                                                                                                                                                                                                            | 1 PT(10%)           |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                           | Business Data Stewards                                                                                                                                                                                                                                                                                                               | 1 -2 PT(10%)        |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                           | Technology                                                                                                                                                                                                                                                                                                                           | 1 PT(10%)           |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                           | Corporate Services(Clerks, Legal)                                                                                                                                                                                                                                                                                                    | 1 PT (20%)          |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                           | PT = part time resource(s), FT = full time resource(s)                                                                                                                                                                                                                                                                               |                     |                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Assumptions:</b> <ul style="list-style-type: none"><li>Formalized Communication Plan with messaging top-down coming from Senior Executives to their respective business lines</li><li>Engagement from Business includes Leaders, Managers and Data Users*</li><li>Activities can be done in parallel with Executing PoC</li></ul> |                     |                               |

# Short Term Initiatives- Tear Sheet Cont'd

## Detailed Immediate Next Steps – Initiative 5.1 Formalize & Operationalize Performance Measurement & Reporting metrics

| Initiative Description | Formalize & Operationalize Performance Measurement & Reporting metrics |                  |                                  |
|------------------------|------------------------------------------------------------------------|------------------|----------------------------------|
| Primary Owner (\$)     | CDGA(Corporate Data Governance and Analytics )                         | Support Owner(s) | Business Departments, Technology |

**Note:** The estimates for costs and resourcing are generic estimates which do not account for synergies that may be achieved in delivering these initiatives for Town.

| High-level Activities                                                                                                                                                                                                                                                                                                                                                                                | Stakeholder Groups                                                                                                                                   |                                              |                                                                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|----------------------------------------------------------------------|
| <u>Initiative 5.1</u><br>5.1.1 – Understand the current performance measurement & reporting requirements for targeting specific data capabilities<br>5.1.2 – Define performance metrics to assess the progress and success of PoC and other governance initiatives<br>5.1.5 – Identify and categorize Town’s metrics into required reporting audiences (e.g.: ELT, CDGA, Business, Technology, etc.) | <ul style="list-style-type: none"> <li>Technology</li> <li>Corporate Services(Clerks, Legal)</li> <li>ELT</li> <li>Business Data Stewards</li> </ul> |                                              |                                                                      |
| Dependencies                                                                                                                                                                                                                                                                                                                                                                                         | Directional Estimates                                                                                                                                |                                              |                                                                      |
| Initiative Dependency-<br>1.2 – Identify existing programs/transformations that can be leveraged to execute on the data strategy. Prioritize and determine PoC to execute and operationalize the data strategy<br>2.1.2 –Determine master data domain ownership structure with business data steward identified for business department                                                              | Description                                                                                                                                          | High-level Estimate                          | Duration for External Support                                        |
|                                                                                                                                                                                                                                                                                                                                                                                                      | External/Internal Support                                                                                                                            | ~ \$150 - \$200k                             | ~2 Months ( Metric definition)<br>~2 Months ( Dashboard development) |
| Benefits/ Value Proposition                                                                                                                                                                                                                                                                                                                                                                          | Town Resource Requirements (Town staff involvement)                                                                                                  |                                              |                                                                      |
| <ul style="list-style-type: none"> <li>Alignment of metrics that will be reported to demonstrate progress</li> <li>Lessons learnt from PoC that informs mid-term priorities</li> </ul>                                                                                                                                                                                                               | Resource Type                                                                                                                                        | Effort Type                                  |                                                                      |
|                                                                                                                                                                                                                                                                                                                                                                                                      | CDGA ( Project Lead)                                                                                                                                 | 1 PT(30%)                                    |                                                                      |
|                                                                                                                                                                                                                                                                                                                                                                                                      | ELT                                                                                                                                                  | Available for attending review workshops(5%) |                                                                      |
|                                                                                                                                                                                                                                                                                                                                                                                                      | Corporate Services(Clerks, Legal)                                                                                                                    | 1 PT(10%)                                    |                                                                      |
|                                                                                                                                                                                                                                                                                                                                                                                                      | Technology                                                                                                                                           | 1 PT(20%)                                    |                                                                      |
|                                                                                                                                                                                                                                                                                                                                                                                                      | Business Data Stewards                                                                                                                               | 1 PT(10%)                                    |                                                                      |

### Assumptions:

- Established alignment with external & Internal stakeholders
- Activities can be done parallel to Defining Target state solution architecture & Executing PoC

PT = part time resource(s), FT = full time resource(s)

# Short Term Initiatives- Tear Sheet Cont'd

Detailed Immediate Next Steps – Initiative 6.2 Data Governance Policy; Initiative 6.3 Master Data Management ; Initiative 6.4 Data Integration

|                               |                                                                                                        |                         |                                   |
|-------------------------------|--------------------------------------------------------------------------------------------------------|-------------------------|-----------------------------------|
| <b>Initiative Description</b> | Develop policy, standards & processes for data governance, master data management and data integration |                         |                                   |
| <b>Primary Owner (\$)</b>     | CDGA (Corporate Data Governance and Analytics )                                                        | <b>Support Owner(s)</b> | Corporate Services(Clerks, Legal) |

**Note:** The estimates for costs and resourcing are generic estimates which do not account for synergies that may be achieved in delivering these initiatives for Town.

| High-level Activities                                                                                                                                                                                                                                                                                                                                                                        | Stakeholder Groups                                                                                                                                                                                                                                                                                                                                                             |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|---------------------|-------------------------------|---------------------------|------------------------------------|------------|------------|------------|-----|----------------------------------------------|-----------|-----------|
| <u>Initiative 6.2</u><br>6.2.3 – Define and establish consistent standards and common processes for maintaining and enforcing data governance standards, managing and resolving data related issues                                                                                                                                                                                          | <ul style="list-style-type: none"><li>Technology</li><li>Corporate Services(Clerks, Legal)</li></ul>                                                                                                                                                                                                                                                                           |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| <u>Initiative 6.3</u><br>6.3.2 – Define classification policy                                                                                                                                                                                                                                                                                                                                | <ul style="list-style-type: none"><li>ELT</li><li>Commissions/Business Leaders (Community Services/ Infrastructure/ Development)</li></ul>                                                                                                                                                                                                                                     |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| <u>Initiative 6.4</u><br>6.4.1 – Define and implement Technical & business glossary standard<br>6.4.2 – Execute Technical & Business Glossary maintenance<br>6.4.3 – Define and implement metadata capture & maintenance standard                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| Dependencies                                                                                                                                                                                                                                                                                                                                                                                 | Directional Estimates                                                                                                                                                                                                                                                                                                                                                          |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| Initiative Dependency-<br>2.1.2 –Determine master data domain ownership structure with business data steward identified for business department<br>2.2.3 – Stand up CDGA as PMO in short-term and clarify role to deliver on PoC scope<br>7.1.1 – Assess current state solution architecture and identify tooling/feature gaps to establish top-priority data capabilities (e.g. data lakes) | <table><tr><th>Description</th><th>High-level Estimate</th><th>Duration for External Support</th></tr><tr><td>External/Internal Support</td><td>~ \$350 - \$450k</td><td>~4 Months</td></tr></table>                                                                                                                                                                           | Description                   | High-level Estimate | Duration for External Support | External/Internal Support | ~ \$350 - \$450k                   | ~4 Months  |            |            |     |                                              |           |           |
| Description                                                                                                                                                                                                                                                                                                                                                                                  | High-level Estimate                                                                                                                                                                                                                                                                                                                                                            | Duration for External Support |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| External/Internal Support                                                                                                                                                                                                                                                                                                                                                                    | ~ \$350 - \$450k                                                                                                                                                                                                                                                                                                                                                               | ~4 Months                     |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| Benefits/ Value Proposition                                                                                                                                                                                                                                                                                                                                                                  | Town Resource Requirements (Town staff involvement)                                                                                                                                                                                                                                                                                                                            |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| <ul style="list-style-type: none"><li>Standardized data governance policy and related standards for prioritized data management capabilities</li></ul>                                                                                                                                                                                                                                       | <table><tr><th>Resource Type</th><th>Effort Type</th></tr><tr><td>CDGA ( Project Lead)</td><td>1 FT(&gt;70%)</td></tr><tr><td>Corporate Services( Clerks, Legal)</td><td>1 FT(&gt;70%)</td></tr><tr><td>Technology</td><td>1 PT (10%)</td></tr><tr><td>ELT</td><td>Available for attending review workshops(5%)</td></tr><tr><td>Business*</td><td>1 PT(10%)</td></tr></table> | Resource Type                 | Effort Type         | CDGA ( Project Lead)          | 1 FT(>70%)                | Corporate Services( Clerks, Legal) | 1 FT(>70%) | Technology | 1 PT (10%) | ELT | Available for attending review workshops(5%) | Business* | 1 PT(10%) |
| Resource Type                                                                                                                                                                                                                                                                                                                                                                                | Effort Type                                                                                                                                                                                                                                                                                                                                                                    |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| CDGA ( Project Lead)                                                                                                                                                                                                                                                                                                                                                                         | 1 FT(>70%)                                                                                                                                                                                                                                                                                                                                                                     |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| Corporate Services( Clerks, Legal)                                                                                                                                                                                                                                                                                                                                                           | 1 FT(>70%)                                                                                                                                                                                                                                                                                                                                                                     |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| Technology                                                                                                                                                                                                                                                                                                                                                                                   | 1 PT (10%)                                                                                                                                                                                                                                                                                                                                                                     |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| ELT                                                                                                                                                                                                                                                                                                                                                                                          | Available for attending review workshops(5%)                                                                                                                                                                                                                                                                                                                                   |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| Business*                                                                                                                                                                                                                                                                                                                                                                                    | 1 PT(10%)                                                                                                                                                                                                                                                                                                                                                                      |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |
| <b>Assumptions:</b> <ul style="list-style-type: none"><li>Established alignment with external &amp; Internal stakeholders</li><li>Engagement from Business includes Leaders, Managers and Data Users*</li></ul>                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                |                               |                     |                               |                           |                                    |            |            |            |     |                                              |           |           |

PT = part time resource(s), FT = full time resource(s)

PT = part time resource(s), FT = full time resource(s)

# Short Term Initiatives- Tear Sheet Cont'd

Detailed Immediate Next Steps – Initiative 7.1 Define Target-State solution architecture with Data landing zone; Initiative 7.2 Define & rationalize Technical or Tool Requirements for Architecture and establish Single source of Truth

| Initiative Description | Define target state solution architecture & Perform technology or tools assessments to meet the requirements of the PoC |                  |                      |
|------------------------|-------------------------------------------------------------------------------------------------------------------------|------------------|----------------------|
| Primary Owner (\$)     | CDGA (Corporate Data Governance and Analytics )and Technology                                                           | Support Owner(s) | Business Departments |

**Note:** The estimates for costs and resourcing are generic estimates which do not account for synergies that may be achieved in delivering these initiatives for Town.

| High-level Activities                                                                                                                                                                                                                                                                                                                                            |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Initiative 7.1</u><br>7.1.1 – Assess current state solution architecture and identify tooling/feature gaps to establish top-priority data capabilities (e.g. data lakes)<br>7.1.2 – Define architecture guiding principles & initiatives to address identified gaps in order to achieve desired technical outcomes; Set up a review team for approval         |
| <u>Initiative 7.2</u><br>7.2.1 – Document top-priority core applications/tools for data sourcing, ingestion & data landing; Determine tool integration avenues using existing tools & applications assessments<br>7.2.4 – Utilize solution architecture to map metadata for critical data elements and thereby establish data inventory & single source of truth |
| Dependencies                                                                                                                                                                                                                                                                                                                                                     |
| Business Dependency- <ul style="list-style-type: none"><li>Key Funding and resources for new technology, tools, implementation and training</li></ul>                                                                                                                                                                                                            |
| Initiative Dependency-<br>1.1 –Formalize Corporate data strategy to support Town’s data vision<br>1.2 –Prioritize and determine PoC to execute and operationalize the data strategy                                                                                                                                                                              |
| Benefits/ Value Proposition                                                                                                                                                                                                                                                                                                                                      |
| <ul style="list-style-type: none"><li>Conceptual Target state solution architecture clearly defined</li><li>Required applications identified to meet PoC &amp; solution architecture needs implemented</li></ul>                                                                                                                                                 |

| Stakeholder Groups                                                                                                       |                                                                                    |  |
|--------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|--|
| <ul style="list-style-type: none"><li>Technology ( System Architect)</li><li>Corporate Services(Clerks, Legal)</li></ul> | <ul style="list-style-type: none"><li>ELT</li><li>Business Data Stewards</li></ul> |  |

| Directional Estimates     |                     |                               |
|---------------------------|---------------------|-------------------------------|
| Description               | High-level Estimate | Duration for External Support |
| External/Internal Support | ~ \$200 - \$300k*   | 2 Months                      |

| Town Resource Requirements (Town staff involvement) |                                              |
|-----------------------------------------------------|----------------------------------------------|
| Resource Type                                       | Effort Type                                  |
| CDGA( Project Lead)                                 | 2 FT(>70%)                                   |
| Business Data Stewards                              | 1-2 PT(20%)                                  |
| Technology ( 1 Application Architect)               | 1 FT(>70%)                                   |
| ELT                                                 | Available for attending review workshops(5%) |
| Corporate Services(Clerks, Legal)                   | 1 PT(10%)                                    |

Assumptions:

- CDGA Expects 2 FT - 1 Data Management Lead ( Business Architect), 1 Data & Analytics Analyst)
- Stakeholder interviews and workshops around current state architecture gaps and inventory of tools to support the PoC

PT = part time resource(s), FT = full time resource(s)

## **Appendix B – Data Governance Model options, Roles and roadmap journey**

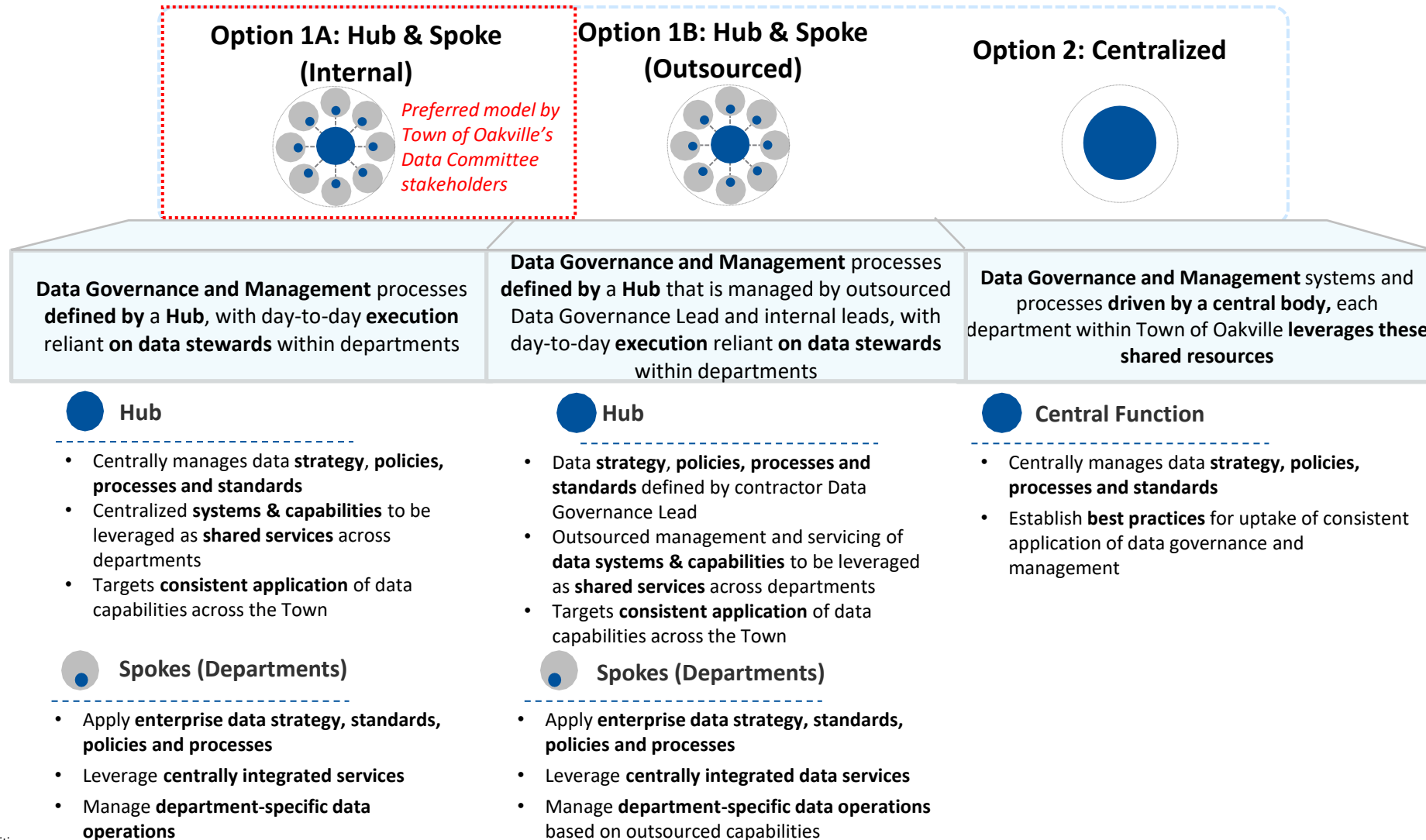
# Performance Measures

The below highlights quantifiable efficiencies that can be achieved by implementing corporate data governance:

| Performance Measures                                     | Quantifiable analysis                                                                                                                                                                               |
|----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Efficiency and empowerment of teams                   | Standardized data and solution architecture will provide quality data for processing and reporting, thereby <b>saving at least 50% of resource time</b> in data cleansing                           |
| 2. Clarity on role and Talent retention                  | Better employee <b>job satisfaction, talent retention</b> with skills that includes data, analytics, AI                                                                                             |
| 3. Operational efficiency                                | Reliance on single source of truth will improve productivity through <b>availability of timely and accurate data</b> for business decision making                                                   |
| 4. Meeting regulatory expectations                       | Data governance and management practices will allow the Town to <b>comply with existing and upcoming data protection and privacy requirements</b> such as Bill C-27, potentially avoiding any fines |
| 5. Leadership                                            | Data Governance will <b>allow better</b> governance and oversight / <b>accountability</b> of decisions while allowing business to be more data driven                                               |
| 6. Reduced technical debt and technology standardization | Robust target state architecture will allow to <b>remove redundancy of legacy systems</b> and optimally manage ongoing <b>infrastructure and application costs</b>                                  |

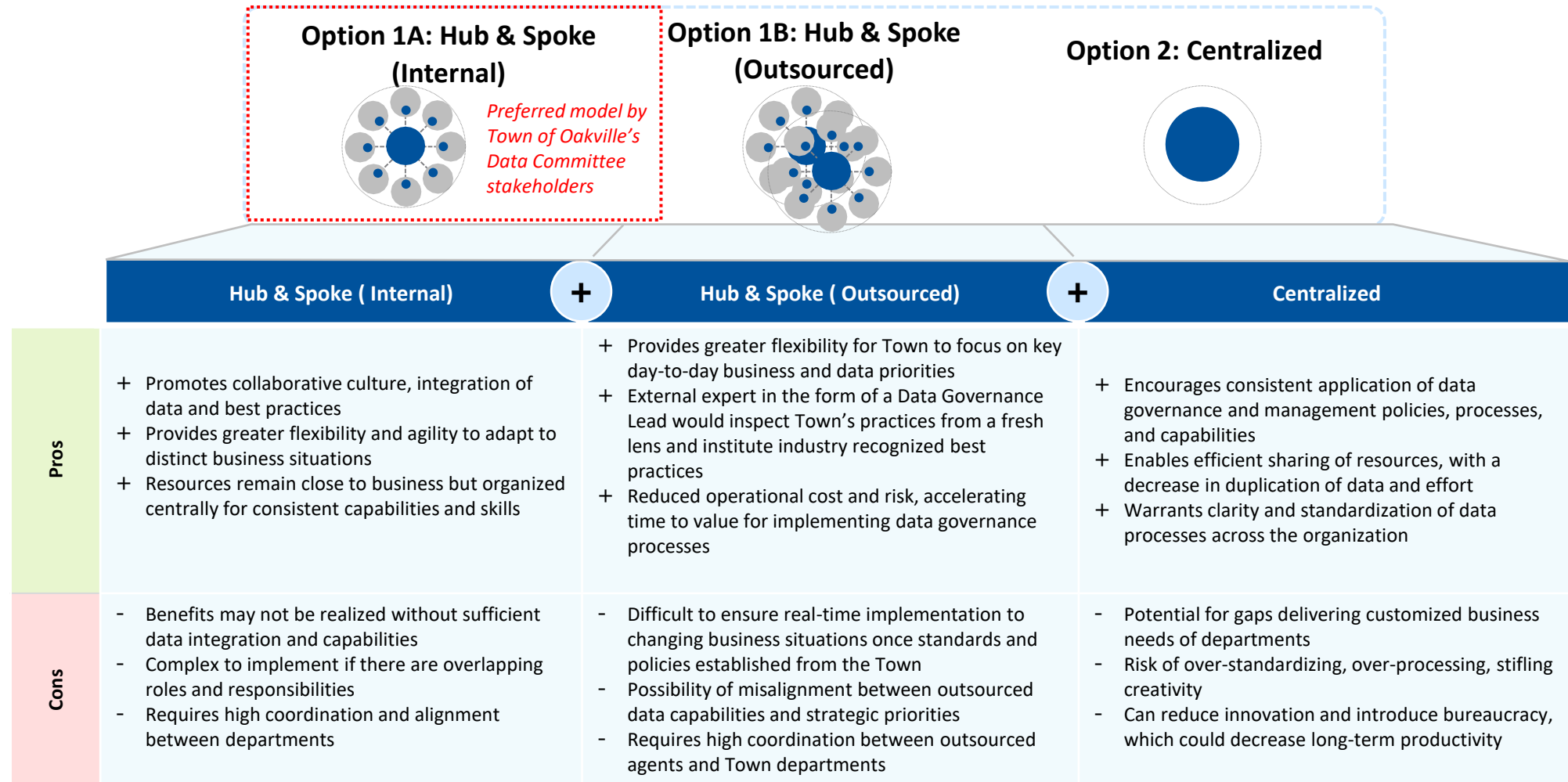
# Options: Data Governance Operating Models

Effective data management is achieved by ensuring that the right people are equipped with the right capabilities, processes, and tools to deliver on Town of Oakville's corporate objectives. The best fit frameworks below highlight the recommended data governance operating models that could be adopted.



# Pros/Cons of Options: Data Governance Operating Models

Effective data management is achieved by ensuring that the right people are equipped with the right capabilities, processes, and tools to deliver on Town of Oakville's corporate objectives. The pros and cons of recommended data governance operating model framework is highlighted below.



# Role description for Business, Technology & Enabling Corp Services

Within the Corporate Data Governance & Analytics, you will need resources with the appropriate skillset to move the data & analytics strategy forward.

| Dept.                                 | Roles                                                                                                                                   | High-level description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Potential Designation Level                 |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|
| Business                              | <br>Business Data Owner                                | <ul style="list-style-type: none"> <li>Accountable for overall governance and management of a functional data domain, transformational program or business initiatives within Business department.</li> <li>Providing leadership support and oversees the implementation and adoption of Corporate data standards&gt;</li> </ul>                                                                                                                                                                                                                                                                     | Commissioner / Director                     |
|                                       | <br>Business Data Steward                              | <ul style="list-style-type: none"> <li>Manage implementation and monitoring of data standards and processes across the respective business area or program.</li> <li>Facilitates decision making and supports transformational program operational team to comply with data standards.</li> <li>Act as a first escalation point for data issues within respective business department or program; escalate data issues to CDGA as appropriate.</li> <li>Participates (as needed) in CDA Steering Team or other data governance forums held by CDGA.</li> </ul>                                       | Manager/Supervisor/Advisor                  |
| Technology                            | <br>Security Architect                                 | <ul style="list-style-type: none"> <li>Responsible for establishing the parameters for server security as per data strategy</li> <li>Responsible to ensure Town's technology meets data privacy &amp; security regulations established by Privacy &amp; Records Specialist</li> </ul>                                                                                                                                                                                                                                                                                                                | Manager/Supervisor/Architect                |
|                                       | <br>Application, Integration & Middleware Architect    | <ul style="list-style-type: none"> <li>Provide application related subject matter expertise and support root cause investigations, provide input to root cause solution alternatives. Is the first escalation point and bring in related technical SMEs as needed.</li> <li>Provide data architecture related subject matter expertise with knowledge of business needs; support in designing solutions that meet requirements and are aligned to Corporate architecture and data standards.</li> <li>Responsible for designing and implementing target state corporate data architecture</li> </ul> | Supervisor/Application & Support Analyst    |
| Enabling Corp Services: Clerks, Legal | <br>Policy & Compliance Specialist ( Legal & Clerks) | <ul style="list-style-type: none"> <li>Oversee and responsible to ensure data related policies and standards are adhered to within the enterprise.</li> <li>Provide subject matter to support for data related risks, regulatory and legislative requirements are met, and changes reflected as necessary.</li> </ul>                                                                                                                                                                                                                                                                                | Assistant Town Solicitor( TBD) Clerks (TBD) |
|                                       | <br>Privacy & Records Specialist                     | <ul style="list-style-type: none"> <li>Oversee adherence and responsible to develop and maintain data privacy and retention/disposition policies and standards and collaborate with CDGA team.</li> <li>Provide subject matter support regarding data privacy and records management including data retention and disposition.</li> </ul>                                                                                                                                                                                                                                                            | Privacy & Records Specialist                |



# Role description for Corporate Data Governance & Analytics(CDGA)

Within the Corporate Data Governance & Analytics, you will need resources with the appropriate skillset to move the data & analytics strategy forward.

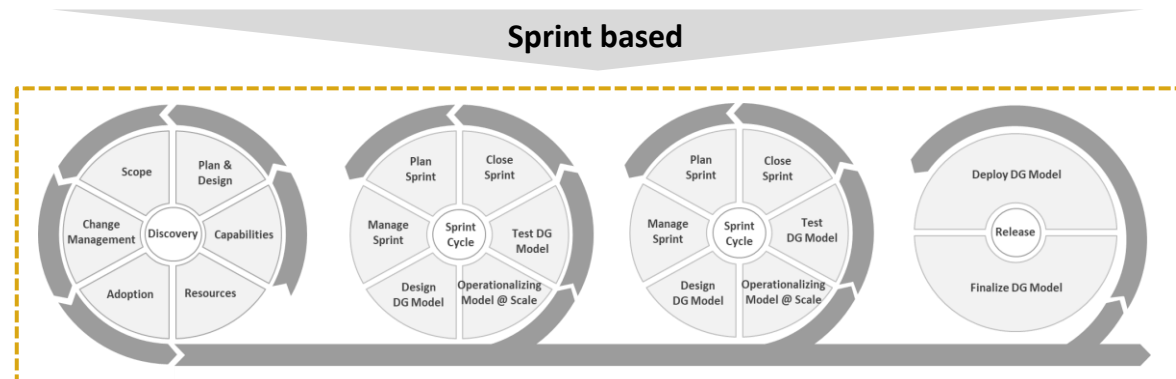
| Function                                        | Roles                                                                                                                                   | High-level description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Potential Designation Level |
|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| Corporate Data Governance and Analytics ( CDGA) | <br>Data Governance & Analytics Lead                   | <ul style="list-style-type: none"> <li>Responsible for corporate data strategy to be implemented across the organization.</li> <li>Responsible for establishing and maintaining corporate level data standards and procedures and enable adoption.</li> <li>Accountable to define data stewardship across enterprise for key data domains or business departments and provide clarity on roles/responsibility</li> <li>Oversees the Corporate Data Governance function and supports/advice business specific programs to implement data standards and processes as expected.</li> <li>Represents the CDGA function at the ELT and oversees data activities and acts as an escalation point for data issues across businesses</li> </ul>                                                                                                                                                                      | Director/Manager            |
|                                                 | <br>Data Management Lead<br>(a.k.a Business Architect) | <ul style="list-style-type: none"> <li>Drive the development of recommendations for issue resolution and ensures that internal and external requirements are accurately addressed in proposed solutions</li> <li>Strongly collaborates with technology and ensure data related technology requirements are embedded as part of the architecture.</li> <li>Provides hands-on support (where businesses need) or addresses data capabilities related questions.</li> <li>Assist in root cause analysis and identifying impacts based on data usage and its lineage</li> <li>Assists in the identification of technology solutions to address corporate data strategy objectives &amp; problems and liaise with the appropriate technology partners.</li> <li>Ensures technology constraints and possibilities are considered when gathering and prioritizing corporate data management initiatives.</li> </ul> | Manager / Advisor           |
|                                                 | <br>Data & Analytics Analyst                         | <ul style="list-style-type: none"> <li>Aggregates, supports CDGA team in prioritization and implementation of required corporate level data governance dashboards and progress.</li> <li>Supports in standardizing reporting tools at the corporate-level in collaborating with technology and understanding business requirements from data consumers' lens.</li> <li>Performs ad-hoc supporting activities, as required by the CDGA team.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Advisor / Analyst           |



# Sprint-based Operationalization Approach

The **sprint-based strategy** must consider prioritized POCs and transformations as the launchpad to execute on corporate data governance and ensure targeted outcomes aligned to Town of Oakville's corporate data and analytics strategy & adoption. The operationalization strategy must address the following key questions to determine a value-based delivery for every sprint:

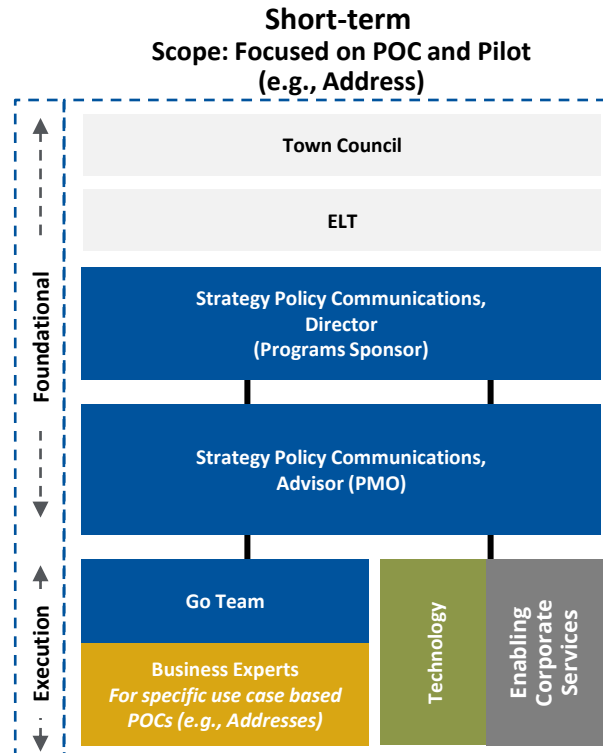
- |                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                        |                                                                                                                                                                                                            |                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <b>Identify</b> priority initiative and <b>Why</b> it has been <b>selected</b> ?                                                                                                                                          |  <b>Who</b> is going to be <b>accountable</b> ?                                                                                                                                                                                                     |  <b>What</b> is the <b>scope</b> and <b>what</b> are <b>we operationalizing</b> ? <b>What</b> data elements, domains and capabilities are required? |  <b>When</b> will these benefits be realized? What timelines are <b>acceptable to the business</b> to realize benefits? |  <b>Which</b> data capabilities will be enabled and <b>for what</b> ? |
| <ul style="list-style-type: none"> <li>❑ Identify <b>why initiative is prioritized</b></li> <li>❑ Determine <b>the corporate-wide benefits</b> when operationalized</li> <li>❑ Ensure <b>use cases</b> are prioritized as per business drivers and include <b>defined metrics</b> and next steps</li> </ul> | <ul style="list-style-type: none"> <li>❑ Clarify <b>who</b> from Business will be <b>accountable for data ownership/stewardship</b></li> <li>❑ Determine <b>data domain groups</b> to enable co-ordination with CDGA</li> <li>❑ <b>CDGA</b> to enable <b>standardized</b> corporate-wide <b>processes</b> and unite teams</li> </ul> | <ul style="list-style-type: none"> <li>❑ Define what <b>data elements</b> will be in scope</li> <li>❑ Decide on <b>what</b> governance <b>capabilities to focus</b> on</li> </ul>                                                      | <ul style="list-style-type: none"> <li>❑ Determine the <b>desired timeframe</b></li> <li>❑ Identify <b>desired scalability</b> to realize value for the prioritized use cases</li> </ul>                   | <ul style="list-style-type: none"> <li>❑ Define <b>required technology capabilities</b> and <b>resources</b></li> </ul>                                  |



# Operationalization Journey of Corporate Data Governance Operating Model

The Journey can start with a short-term Proof of Concept (PoC) to reach the target state. It is also possible to have two terms going simultaneously, such as starting with the interim plan while the short-term has started, to reach the Target state faster.

## High Level Overview

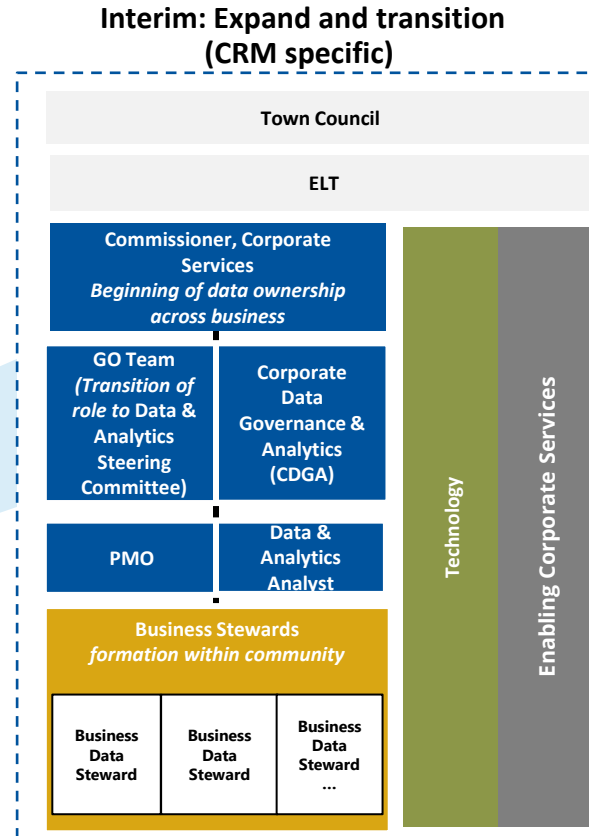


### Foundational (0 – 6 Months)

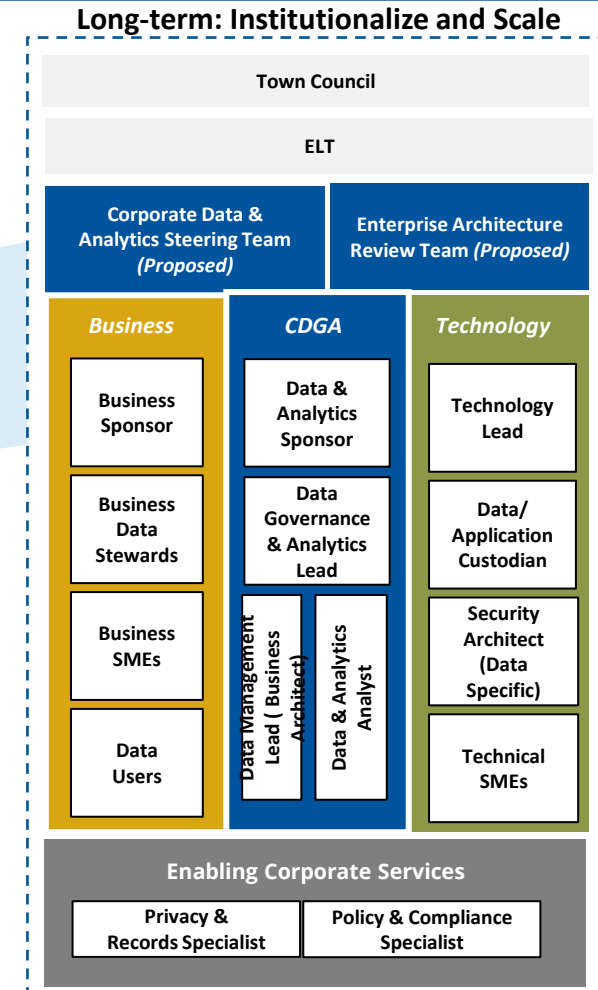
- Establish Corporate Data & Analytics Strategy and Vision
- Rationalize resources and skills
- Assign roles & responsibilities
- Formalize governance structure and mandate

### Execution (6 – 12 Months)

- Test the foundational capabilities through the POC/Pilot
- Assess and Rationalize technology requirements
- Change Management Initiation



**People:** Roles, accountability and associated departments defined, in seat, with PMO overseeing the launch and roll out  
**Process:** All processes identified, policy & standards created and rolled out, compliance processes in development  
**Tools & Technology:** All data sources identified, including tracing the data to internal and external sources  
**Change Management:** Establish and Initiate Execution



**People:** All CDGA roles in seat, with working committees/ councils at each level, adoption on CDGA  
**Process:** Processes developed to align to all policy & standards, Compliance Monitoring  
**Tools & Technology:** A corporate tool is implemented to help with issue management, data quality, metadata, etc.  
**Change Management:** Execute and Adopt throughout Town



# Path to Successful Corporate Data Management Strategy

Target state capabilities will be achieved in a phased approach to align with the Town of Oakville's key milestones

## Short Term (Addresses as Data Domain) (0 - 12 Months)★

### Foundational

- ❑ Define & Establish **Corporate Data Governance & Analytics** Strategy
- ❑ Rationalize **Resources & Skills** & Assign **Roles & Responsibilities**
- ❑ **Initiate** Masterdata, and Data Integration capabilities ; perform Data lineage
- ❑ Perform current **Technology Assessments and rationalization**
- ❑ Initiate a **Community of Practice(CoP)**

### Execution

- ❑ Test the **foundational capabilities** through **Addresses POC**
- ❑ **Define and Monitor** performance metrics for PoC
- ❑ **Gradual transition of responsibilities, initiatives, and knowledge** from the **Go Team** to the **Data & Analytics Steering Committee**

Data Governance

Data Integration  
(Business &  
Technical standards)

Masterdata (Data  
domains)

## Mid-Term (Expand from POCs to corporate-wide mandates) (13 - 24 Months)★

- ❑ **Measure engagement and adoption** of the Function, Strategy and Community of Practice through well-defined metrics
- ❑ Transition **Interim roles and knowledge** to finalize remaining **Roles & Responsibilities**, and stand up the **remaining Data Domains**
- ❑ **Initiate** Data Quality, Data protection & privacy ( data classification) and data operations & decision enablement capabilities
- ❑ **Evolve** the short-term data management capabilities- data quality, data governance & masterdata
- ❑ **Standardize Technology** ( tools, applications etc.) **as per solution architecture** and **evaluate** requirements for technology **platform**

Data Quality

Data Protection &  
Privacy (Data  
Classification)

Data Operations &  
Decision  
Enablement

Data Governance

Data Integration  
(Business &  
Technical standards)

Masterdata (Data  
domains)

## Long Term (Defined Teams) (25 - 36 Months)★

- ❑ Achieve a current **Data Management** state of **"Managed"** with **full-scale institutionalization of the governance mandate** through Hub & Spoke model
- ❑ **Embed data into the culture** through data literacy and onboarding as part of the communications & change management strategy
- ❑ **Initiate Business Intelligence & Analytics** with regular reporting across all data management capabilities
- ❑ **Evolve** all **mid-term** data management capabilities
- ❑ **Adopt Corporate Data Governance platform** and explore **automation** opportunities to improve efficiency

Business  
Intelligence &  
Analytics

Data Quality

Data Protection &  
Privacy (Data  
Classification)

Data Operations &  
Decision  
Enablement

Data Governance

Data Integration  
(Business &  
Technical standards)

Masterdata (Data  
domains)

Technology : Rationalization & Requirements

Technology: Standardization

Technology : Adoption & Automation

Communications and Change Management

Measurement and Reporting



## Sample Scenario: RACI explained

For the scenario provided on page #18 - Identifying Data Quality Issue with Address Data, a view of how responsibilities and accountability will be executed is provided in the next slide.

**Responsible** to ensure activities are completed successfully  
(Who is ensuring the activities are done)

**Accountable** for the outcomes/consequences and /or accepts the risk  
(Who ultimately owns the risk)

**Consulted** for inputs and feedback, typically subject matter experts  
(Who is providing input/insights/two-way communication)

**Informed** of the results, decisions or actions taken  
(Who is receiving the information / one-way communication?)

## Appendix C – Data Management Capabilities detailed

# Current State Assessment – Corporate Data Management Capabilities



## **Data Protection & Privacy**

The continuous process of protecting and safeguarding the confidentiality and integrity of data from corruption, compromise, or loss as it moves throughout the data lifecycle. This is accomplished by following leading practices such as privacy by design, identity access management, and integrating these practices at the corporate level



## **Data Operations & Decision Enablement**

The collection, storage, access, evaluation, and utilization of data. This encompasses data evaluation, SLA definition, authoritative data source registration, and data preparation to deliver real-time services and enable operational transformation



## **Data Quality Management**

The measurement of the health and usability of all data assets across the organization in a standardized manner, enabling the identifying, profiling, cleansing, monitoring, and adherence to relevant metrics assuring completeness and accuracy of data



## **Business Intelligence & Analytics**

How data and insights are governed and how data is presented to end-users and consumers to support analysis and decision-making activities, including but not limited to reporting, visualizations, dashboards, and analytical outputs



## **Data Integration**

The approach for sourcing, routing, orchestrating, and governing shared critical data assets to minimize redundancy within the Town, allowing to effectively leverage data on a consistent basis at a corporate level



## **Data Governance**

Processes, reporting, and metrics which guide organizational change management and cultural change towards operational quality and efficiency, driving growth and development by adopting new standard procedures and steps towards a desired target state. This includes data ownership and well-defined roles, responsibilities, and accountabilities



## **Master Data Management**

Applying business rules to data (labelling, enterprise-wide business requirements). Master data should be well-defined, mapped to trusted sources, and supported by specific business processes and rules

# Data Governance Capability – Data Protection & Privacy

The continuous process of protecting and safeguarding the confidentiality and integrity of data from corruption, compromise, or loss as it moves throughout the data lifecycle. This is accomplished by following leading practices such as privacy by design, identity access management, and integrating these practices at the corporate level

## Data Protection & Privacy

### Encryption

Data encryption converts data from a readable format to an encoded format. Users and processes can read and process the data only after the encryption is removed

### Anonymization

Data anonymization is the process of protecting private or sensitive information by encrypting or deleting personally identifiable information from a database. This activity is done for the purpose of protecting an individual's or a company's private activities while maintaining data integrity

### Classification

The process of dividing and arranging data into appropriate categories based on their shared features, such as their level of sensitivity and the risks they pose, as well as the compliance requirements that protect them. Data classification enables businesses to establish encryption and anonymization policies to effectively protect the business data

### Masking

Also known as obfuscation, hides the actual data using modified content like characters or numbers, creating an alternate version of data that cannot be easily identifiable or reverse engineered, protecting data classified as sensitive (ie. PHI data)

### Data Access Management

Data Access Management is a set of processes and technologies used to control access to an application or data. It involves creation of groups or roles with defined access privileges

# Data Governance Capability – Data Operations & Decision Enablement

Collection, storage, access, evaluation, and utilization of data. This encompasses data evaluation, SLA definition, authoritative data source registration, and data preparation to deliver real-time services and enable operational transformation

| Data Operations & Decision Enablement  |                                                                                                                                                                                                                                              |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Authoritative Data Source Registration | Registration of sets of data assets that provide trusted, timely, and secure information to support Town’s processes                                                                                                                         |
| SLA Definition                         | Defined standards to ensure guarantee for Town to attain level of service a provided by a vendor or product                                                                                                                                  |
| Data Evaluation                        | An assessment of data usability that is determined based upon evaluating pre-defined criteria, to ensure meaningful insights can be extracted from the data available                                                                        |
| Data Preparation                       | Data preparation is the process of preparing/cleaning raw data so that it is suitable for further business analysis processes.                                                                                                               |
| Synthetic Data Generation              | Synthetic data is the information that is artificially manufactured by machine-learning algorithms rather than generated by real-world events. Synthetic data is critical for strategic planning of future events based on current use cases |
| Test Data Preparation                  | Test data preparation is critical for generating a high- quality synthetic data, which eventually improves the strategic future risk management ability of any organization                                                                  |

# Data Governance Capability – Data Quality

The measurement of the health and usability of all data assets across the organization in a standardized manner, enabling the identifying, profiling, cleansing, monitoring, and adherence to relevant metrics assuring completeness and accuracy of data

| Data Quality                            |                                                                                                                                                                                                                                                  |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Quality Rule Design                | Data Quality rules are the requirements or expectations that businesses set to their data. Individual departments may have their independent customized data quality metrics, aligned to the overall enterprise metrics.                         |
| Data Quality Profiling                  | Quality profiling refers to the process of examining, analyzing, reviewing and summarizing data sets to gain insight into the quality of generated data.                                                                                         |
| Issue Management                        | Data Issue Management is a process of removing or reducing the impact of obstacles that prevent effective use of data. Furthermore, it includes identification, definition, quantification, prioritization and resolution of data quality issues |
| Root Cause & Impact Analysis            | The standard set of processes for determining the root cause of any data set that fail to meet the quality metrics, and creating mitigation strategies to avoid potential negative business impact                                               |
| Data Quality Monitoring & Visualization | The visual tracking of data quality metrics to ensure that the various teams and overall enterprise are maintaining the set quality standards and tracking any deviations                                                                        |

# Data Governance Capability – Business Intelligence & Analytics

How data and insights are governed and how data is presented to end-users and consumers to support analysis and decision-making activities, including but not limited to reporting, visualizations, dashboards, and analytical outputs

| Business Intelligence & Analytics |                                                                                                                                                                                                                                                                                                                               |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reporting & Visualization         | Helps analysts and key decision-makers understand difficult concepts or identify new patterns for decision making / actionable insights from business data.                                                                                                                                                                   |
| DevOps/ MLOps                     | DevOps is the combination of cultural philosophies, practices, and tools that increase an organization's ability to deliver applications and services through better coordination between software development and IT teams. MLOps aims to deploy and maintain machine learning models in production reliably and efficiently |
| Model Validation                  | Model validation is the task of validating if the outputs of a particular model/algorithm are acceptable with respect to the data-generating process established by the organization                                                                                                                                          |
| Analytics & AI Modeling           | AI modelling is the creation, training, and implementation of machine learning algorithms that emulate logical decision-making based on available data                                                                                                                                                                        |

# Data Governance Capability – Data Integration

The approach for sourcing, routing, orchestrating, and governing shared critical data assets to minimize redundancy within the Town, allowing to effectively leverage data on a consistent basis at a corporate level

| Data Integration                   |                                                                                                                                                                                                                                                                                     |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Metadata Management                | Collection, storage and management of information about the organization’s data assets (source, ownership, security profile, etc.)                                                                                                                                                  |
| Metadata Access                    | Information regarding any restrictions that may exist on accessing and using the metadata for a particular data set within the Town                                                                                                                                                 |
| Technical & Business Glossary      | Collection of data related terms with their definitions that Town can use to ensure the same definitions are used at a corporate level for data related activities                                                                                                                  |
| Data Lineage                       | Document how data is acquired or created, where it moves, how it is updated, and how it is used by the Town                                                                                                                                                                         |
| Data Source Access and Cataloguing | Organized inventory of data assets in the organization; helps with collecting, organizing, accessing, and enriching of data to support data discovery and governance                                                                                                                |
| Data Ingestion                     | Data Ingestion is the process of obtaining and importing data for immediate use or storage in a database. Data can be ingested in real time or in batches                                                                                                                           |
| Data Pipeline                      | A set of tools and processes used to automate the movement and transformation of data between a source system and a target repository                                                                                                                                               |
| Extract Transform Load             | ETL is a data integration process that combines data from multiple data sources into a single, consistent data store that is loaded into a data warehouse or other target system. It then transforms the data according to business rules and stores data into a destination store. |

# Data Governance Capability – Data Governance

Processes, reporting, and metrics which guide organizational change management and cultural change towards operational quality and efficiency, driving growth and development by adopting new standard procedures and steps towards a desired target state. This includes data ownership and well-defined roles, responsibilities, and accountabilities

| Data Governance                   |                                                                                                                                                                                                                                                                             |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Governance Operating Model   | Outlines how an organization defines roles, responsibilities, business terms, asset types, relations, domain types, and more. This, in turn, affects how workflows and processes function; it impacts how an organization operates around its data                          |
| Roles & Responsibilities          | The various roles and responsibilities in a data governance, often consolidated in a RACI, highlight the critical team structures and individual accountability towards any data governance initiative or framework                                                         |
| Data Governance Framework         | A governance framework creates a single set of rules and processes for collecting, storing, and using data. A robust framework makes it easier to streamline and scale core data governance processes                                                                       |
| Policies & Standards              | A documented set of guidelines for ensuring that an organization's data and information assets are managed consistently and used properly. The document also outlines data management expectations, responsibilities and individual goals of each stakeholder & team member |
| Regulatory Compliance             | Adherence to laws, regulations, and guidelines created by various government legislations and regulatory bodies.                                                                                                                                                            |
| Communication & Change Management | Change management is a systemic approach to dealing with the transition or transformation of an organization's data goals, processes or technologies                                                                                                                        |
| Data Literacy & Training          | Data literacy is the ability to read, write and communicate data in context, including an understanding of data sources & analytical methods, and the ability to describe the use cases, application and the resulting business value.                                      |

# Data Governance Capability – Master Data Management

Applying business rules to data (labelling, enterprise-wide business requirements). Master data should be well-defined, mapped to trusted sources, and supported by specific business processes and rules

| Master Data Management                   |                                                                                                                                                                                                                                   |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Master Data Repository                   | The framework which represents master data objects and entities. It is used to centralize all the cross-functional elements in the information system                                                                             |
| Match Merge Survivorship rules           | The process by which duplicate data records are merged to produce a final record. The master record in each group is the result of merging two similar records as per the survivorship rules.                                     |
| Corporate Solution Architecture          | An enterprise architecture describes how data is managed from collection through to distribution, transformation and consumption. It sets the blueprint for data and the way through which it flows through data storage systems. |
| Business Taxonomy & Hierarchy Management | Taxonomy is a way of tagging and hierarchically classifying digital content in an organization's information systems.                                                                                                             |

## Appendix D – Potential Cost Efficiencies & Savings

# Potential Cost Efficiencies & Savings

The execution of data management standards and processes will allow Town of Oakville not only to focus on value generating operations that has long-term benefits but also to realize cost savings. The estimated annual savings for Town of Oakville would be over \$1.2M.

| Cost Optimization                                     | Estimated Savings (\$) | Description                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data cleansing                                        | \$270,000              | - Reduction in time and effort required due to established data cleansing processes, allowing employees to focus on more value generating tasks                                                                                                                                                                                                   |
| Reduced technical debt and technology standardization | \$210,000              | <ul style="list-style-type: none"> <li>- Identification of redundant systems will help in deciding which systems can be decommissioned, hence leading to a savings in annual license and maintenance fees</li> <li>- Employees working on these systems can now allocate their efforts to other systems and boost overall productivity</li> </ul> |
| Reporting                                             | \$540,000              | <ul style="list-style-type: none"> <li>- Streamlining the reporting process can help ensure more efficient delivery of critical reports</li> <li>- Removing redundant or overlapping reports can allow employees to focus on creating critical, value generating insights</li> </ul>                                                              |
| Data searching                                        | \$257,143              | - Reduction in time and effort required due to established standards and processes which helps employees efficiently search required data                                                                                                                                                                                                         |

|                            |                    |
|----------------------------|--------------------|
| <b>Total Savings (\$)*</b> | <b>\$1,277,143</b> |
|----------------------------|--------------------|

*\*Total savings amount is based on the assumption that estimates from key departments are extrapolated for the Town of Oakville*