REPORT

TO:               Karen Mills, Interim CAO
FROM:             Raylene Martell
DATE:             July 3, 2019
REPORT:           CLS.19.16
SUBJECT:          Staff re-organization due to Retirement

RECOMMENDATION:
That report CLS.19.16 be received; and
That Council approves increasing the staff complement in the Council and Legislative Services Department from 3 FT (5 days per week), 1 FT (4 days a week), and 1 PT (3 days a week) to 4 FT (5 days per week) and 1 FT (4 days per week); and
That Council approved the re-allocation of the current budget to meet this increase with no additional impact to the approved 2019 budget.

BACKGROUND AND ANALYSIS:
On June 17, 2019, the Council and Legislative Services (CLS) Department were advised that the PT MSA - Special Projects position was becoming vacant due to a retirement. As is the process with many vacancies, staff met to review the needs of the corporation and the organization of duties. Due to the increase in focus in Customer Service initiatives, staff have proposed a shift in the organization within the CLS department to better suit organizational needs.

The current staff complement includes:
1 FT (5d/w) - Clerk, Director of Council and Legislative Services (Band 13)
1 FT (5d/w) - Deputy Clerk, Manager of IT (Band 10)
1 FT (5d/w) - Customer Service Coordinator (Band 5)
1 FT (4d/w) - MSA - CS, Licensing and Vital Stats (Band 4)
1 PT (3d/w) - MSA - CS, Records Mgmt & Special Projects (Band 4)

An overview of the duties and functions provided in the CLS Department can be found in the attached CLS Overview Report.

The recent inclusion of the Customer Service (CS) function to the CLS department has provided an opportunity for full analysis on all CS systems. The analysis of the systems is cross departmental in providing options and assessments to all departments in areas of customer service automation and making business dealings with the Municipality
simpler and more effective. This position has worked with other departments in the organization to implement such customer service initiatives including the Grey Highlands App, updating the existing telephone systems, allowing for processes for online payments and dealings with the Municipality, and the introduction of the online burn permit system, to name a few.

Current focus is working towards a one-window customer service model for Grey Highlands. The original vision for this position was partly to provide for review and implementation of processes and partly to provide front counter customer service.

The duties of the vacant MSA position included Records Management, mail processing, customer service, secretarial services to Committees and Boards as required and undertaking and coordinating special projects in the Municipality. This position provided Customer Service coverage 1 day a week and other duties included in the job description the remaining 2 days.

The proposed re-organization would provide for increased efficiencies in the organization and assist the corporation in obtaining the "one-window" customer service goal which would provide assistance to all departments. Through "one-window" customer service, the main CS admin would be able to assist members of the public with basic queries related to any offerings of the municipality. This function would allow for a decrease in the number of disruptions to staff working on other projects. Residents would be able to obtain many answers and receive services without having to be bounced from department to department.

In order to facilitate this move, the CLS department would see a shift in responsibilities. CLS is proposing the following structure:

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<th>Proposed Change</th>
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<tr>
<td>1 FT (5d/w) - Clerk, Director of Council and Legislative Services (Band 13)</td>
<td>Maintain current with slight decrease in Committee support, increased focus on legislative and statutory services</td>
</tr>
<tr>
<td>1 FT (5d/w) - Deputy Clerk, Manager of IT (Band 10)</td>
<td>maintain current with slight decrease in Committee support, addition of Records Management</td>
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<tr>
<td>1 FT (5d/w) - Customer Service Coordinator (Band 5)</td>
<td>Maintain CS initiative coordination, decrease front line CS duties, increase committee and board coordination</td>
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<td>1 FT (4d/w) - MSA - CS, Licensing and Vital Stats (Band 4)</td>
<td>Maintain current with main CS focus by telephone with back-up to counter</td>
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<td>1 PT (3d/w) - MSA - CS, Records Mgmt &amp; Special Projects (Band 4)</td>
<td>MSA - CS, add focus to front counter one window, remove records management (covered by Deputy Clerk), remove Special Projects (mainly accounted for in CS Coordinator)</td>
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Under this new model, it is anticipated that there would be no changes to the band positions required.
This structure would see the current coordinator position providing FT coordinator duties within the function of Customer Service to continue to enhance the services currently offered and increase service availability and the function of committee administration with the recent overhaul of Committee and Boards approved recently. The front line one window CS position would provide for the admin functions to help implement the enhanced CS processes developed and be a consistent presence at the main front counter.

FINANCIAL IMPACT:
In order to accomplish this organizational shift, CLS would require the increase from 1 PT (3d/w) to 1 FT within band 4. Discussions with Finance indicate that the Finance Clerk - Tax position (Band 5) is currently is operating at 4d/w. This additional day could be re-allocated to the CS position as it would alleviate the requirement for finance staff to attend the front counter on a regular basis.
This would mean that the financial implications resulting from this shift, would be 1 additional day at Band 4.
Based on the current status, the financial impact for this additional day would be absorbed in the operating budget due to recent changes in the organization.

STAFFING IMPACT:
Current Job descriptions within CLS would be modified to meet requested changes should this be approved. The vacancy in the CLS department would be advertised with the new job description.

CONSULTATION:
Director of Finance/Treasurer/Interim CAO Karen Mills

FILE OR REFERENCE:
Attachment 1: CLS Overview Report Mid-2019

Approved By: Raylene Martell, Director of Council and Legislative Services/Municipal Clerk
Status: Approved - 23 Jun 2019

Approved By: Karen Mills, Director of Finance/Treasurer/Interim CAO
Status: Approved - 23 Jun 2019
Council & Legislative Services

WHAT WE DO – A MID-2019 REVIEW
RAYLENE MARTELL

MUNICIPALITY OF GREY HIGHLANDS | www.greyhighlands.ca
**Introduction**

The Council and Legislative Services Department (CLS) is responsible for coordinating and supporting various statutory responsibilities provided by the Municipal Act, Vital Statistics Act, Marriage Act, Municipal Freedom of Information and Protection of Privacy Act, the Planning Act and the Municipal Elections Act.

Pursuant to these statutes, municipal policies and municipal best practice, CLS provides secretariat support to Council, its Committees and various Boards, documents the official record of the actions of Council, provides front line Customer Service for the municipality, performs IT functions for the corporation, has a mandate to manage the municipality’s records and information, processes Freedom of Information requests, serves as the returning office with respect to the administration of Municipal and School Board Elections and provides various other internal and public support services. These processes have been broken down in 6 key functional areas:

- Legislative Services – includes services related to Council Secretariat functions, by-law and policy implementation and notice
- Customer Service – includes services and function to support enhanced customer service initiatives and value-add for residents.
- Statutory Services – includes services either required or recommended through provincial legislation
- Access & Privacy – Accountability and transparency measures brought forward through MFIPPA
- Records and Information Management – maintaining, storage, retrieval, and archival of Municipal Records.
- Information Technology – the safe, effective and efficient use of technology services within the municipality

We like to say that CLS is the hub of the Corporation and touches all aspects of daily Municipal life for residents, the public, Council and employees.
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Structural Overview

Council and Legislative Services

- Legislative Services
- Customer Service
- Statutory Services
- Access & Privacy
- Records and Information Management
- Information Technology

- Meeting Management
- Council & Citizen Appointments
- Statutory Notices
- Legislation Coordination and Policy Review
- Agreement/MOU Review and Tracking

- In Person Front Counter Service
- Info email administration
- Front line Phone Service
- Service Request / Complaints Administration
- Cemetery Service administration
- Canine Licensing
- Mail Services

- Marriage Services (Proposed)
- Commissioner for Affidavits
- Vital Statistics
- Municipal Elections
- Ontario Wildlife Damage Compensation Program
- Line Fences Act Administration
- Lottery Licensing

- MFIPPA Compliance
- Education and Awareness of MFIPPA
- Records & Information Management
- Paper Records Management
- Electronic Document Records Management
- Records Retrieval
- Records Archivist

- Help Desk Support
- Server and Internet Administration
- Telephone Administration
- Cyber Security
- Website/App Management
Summary of Services

Legislative Services

Meeting Management:
Meeting Management services are either fully provided for or assisted by CLS for the following meeting types:

- Council (Regular, Special, and Closed)
- Committee of the Whole
- Public Meetings
- Public Information Sessions
- Public Planning Hearings
- Police Services Board
- Senior’s Advisory Committee
- Joint Waste Disposal Site Committee
- Community Development Advisory Committee
- Museum and Heritage Advisory Committee
- Tourism Advisory Committee (under review)
- Multi-Municipal Long-Term Care Working Group (mandate recently met)
- Any other Committees proposed for the Corporation (Youth Action Committee, Climate Crisis Committee, etc.)

The Meeting Management function provides for the following, most within strict deadlines and notice requirements contained within the procedure by-law:

- creation and distribution of agendas
- creation of Terms of Reference
- receipt, compilation and sharing of correspondence from the public
- creation of reports
- receipt and maintenance of Declarations of Pecuniary Interest
- creation and distribution of minutes
- scheduling of delegations and presentations
- creation and tracking of follow-up action items
- bringing committee recommendations to Council
- completing required after action items resulting from meetings
- provision of notice for meetings
- responding to inquiries from Council and public members, and
- attendance at meetings

Grey Highlands has recently worked toward bringing all of the municipality’s committees into compliance with the Municipal Act to help ensure not only compliance with legislation, but also to facilitate necessary requirements to reduce the risk of the municipality regarding our Municipal insurance. This move has not only ensured that our volunteers working to benefit the community have appropriate coverage in the case of liability, but also provides Council with not only
a consistent reporting mechanism from the committees, but also the oversight required. This move has seen an increase (more than double) the number of meetings being maintained by CLS.

Also new this year is the corporate roll-out of follow-up action tracking which provides a better tracking mechanism to ensure that actionable items resulting from Council resolutions are not missed. Each recommendation from Council that requires a follow-up action produces an entry in the system with direction assigned to a member of the Senior Management Team (SMT) - who may then re-assign to specific staff. These tasks vary from providing a copy of the Council resolution, to research and preparation of report, to finalizing details of a tender award, or any other required action. This process also allows for oversight by allowing the CAO to review the status of any outstanding items when necessary.

In this regard, and to provide ease of locating resolutions passed by Council, CLS is working towards maintaining an update listing of Council resolutions for reference by all staff and Members of Council.

**Council and Citizen Appointments:**
CLS oversees the appointment of Council members and members of the public to the various committees and bodies noted above, but also to outside organizations that require or request Council involvement. This function includes:

- posting for appointments
- responding to all public inquiries on appointments and committees
- receipt of applications
- presentation applications to Council
- creation of appointment by-laws
- the updating of records related to committee membership and distribution
- Updating system programs to keep committee membership current.

This has the most impact during the first 6 months following a Municipal Election, however, is an ongoing process when vacancies arise or new committees are formed.

**Statutory Notices:**
This function relates to the provision of notices in accordance with the Planning Act and the Municipality’s Public Notice Policy. Notices specifically related to the Planning Act been delegated to Planning Services, however all other related notice provisions are referred through CLS who provides for the appropriate timing requests through the agenda or forward requests through to Communications for posting within guidelines.

**Legislation Coordination and Policy Review:**
CLS provides oversight and guidance on legislative requirements within the corporation including, most notably, the creation of by-laws and policies. CLS either reviews or creates most by-laws that are placed before Council for consideration to
ensure that the by-law meets the intent of the originator and contains the necessary provisions required. CLS also helps to formulate policies and procedures established within the organization. Policies are the overarching guiding direction provided by Council to staff, with procedures developed as the staff processes required in order to implement Council’s direction. CLS provides an updated listing of current policies and By-laws on the Municipal website.

**Agreement/ MOU Review and Tracking**
CLS is currently working with other departments to review existing Memorandums of Understanding and Agreements to ensure the needs of the organization are met. This review will also include mechanisms for tracking these documents to ensure reporting is received from organizations as indicated, reports required by GH are supplied as required, renewal of documents occur as per the terms and expired documents are reported appropriately.

**Customer Service**
In the first 6 months of 2019, CLS has seen a vast amount of change in relation to Customer Service. In late 2018, the CAO of the time introduced a focussed Customer Service mandate for the Municipality, which resulted in the hiring of a Customer Service Coordinator for the municipality. This position has been instrumental in forwarding the Customer Service initiatives with the goal of providing even better customer service to our residents, visitors and businesses.

**In-person Customer Service:**
CLS has been working towards the creation of a “one-window” customer service function for Grey Highlands. This would provide for a single point of contact for all customer service-related needs in the organization. One visit or one call will be able to “do-it-all” in relation to general customer service needs. Current processes provide for different people to provide customer service based on the area of need.

**Information email administration:**
Approximately 100-200 emails come through the information email for the municipality each week. These emails must be reviewed daily and consistently to determine appropriate response, deletion (in the case of scam or spam), forwarding or filing.

**Front Line Phone Service:**
All calls that come through the main line at the Administration Office, come through CLS. Recent changes to the corporate phone system has already seen the inclusion of extension numbers for the building and planning department to ensure one number to reach all departments. Like the info email, all main phone calls must be received to determine appropriate response. With the move towards one-window customer service, less calls will have to be re-routed to other staff as front-line staff will be trained to respond to all general questions arising from each department.
Streamlined Customer Experience Process Development:
Working with multiple departments, CLS works to ensure services are provided to our residents in an efficient and effective manner. A focus on the move towards one-window customer service will be beneficial for the whole of the Corporation.

Service Request / Complaints Administration:
CLS is currently working on re-implementing a renewed Service Request / Complaints receipt process and system. This process will allow for the tracking from start to finish of service requests or complaints from our residents, visitors and stakeholders.

Cemetery Service Administration:
CLS provides cemetery service procurement and administration within Grey Highlands which includes:

- Plot Purchases (Sale of Interment Rights)
- Niche Purchases
- Interment Services
- Foundation and Monument Installation Administration
- Location of plots
- Genealogical research related to owned cemetery interments

Late 2017, CLS embarked on a process to digitize the numerous historical (fragile) maps and paper records of the Municipally Owned and operated cemeteries. Through the help of Grey County GIS, 2 municipal cemeteries are currently undergoing the conversion process after hundreds of hours of research and comparison of historical data. Once this process has been completed, the public will be able to access plot locates and cemetery mapping online.

Canine Control Services:
CLS provides the function for dog tag administration. This includes invoicing, tracking and tagging all canines within the limits of Grey Highlands under the current Canine Control By-law. Dog licences are required for all dogs in Grey Highlands. The fees raised from dog tags helps to fund the necessary requirements related to canine administration including maintaining the database of owners to ensure dogs can be reunited quickly with their owners should they become lost. A total of 75 regular tags have been issued so far in 2019 and 15 lifetime tags.

Mail Services
CLS receives and distributes all incoming and outgoing mail to the corporation on a daily basis.

Statutory Services
Marriage Services:
The Marriage Act provides the Municipal Clerk with the authority to marry persons in Ontario. There has been a number of requests in recent months for this service and we have had to direct them elsewhere. The Clerk’s Department would like to
offer these services and bring potential new revenue to the Municipality and increased services to our residents.

This proposal would be an enhancement to the currently required vital statistics role of issuing marriage licenses. Clerk’s Department staff would coordinate and customize civil marriage ceremonies to members of the public in a municipal facility based on scheduling availability. Off-site services may also be considered.

**Commissioner for Affidavits:**
The Clerk’s Department is the main department for providing Commissioning Services, although it should be noted that other employees in the organization have also been provided with the authority to commission. Commissioners are required to administer an oath or affidavit to a person related to the subject document after they produce valid government id within specific guidelines. The majority of commissioning comes in the form of Vehicle Licensing with the Licensing office located in close proximity to the Municipal Office.

**Vital Statistics:**
Vital Statistics including Marriage a Death Registrations are provided through the Office of the Registrar General with Division Registrar Services provided through CLS.

To register a death, a family member and the Funeral Director must complete a statement of Death with information about the deceased. The Physician or Coroner attending the death will complete the Medical Certificate of Death which will be given to the Funeral Director. Both forms are then forwarded to the Municipality’s Division Registrar of the municipality where the death occurred. Once both documents are received and recorded by CLS, they will be forwarded to the Office of the Registrar General for final registration. So far in 2019, CLS has processed 42 Death Registrations.

To obtain a license to marry in Ontario, a valid Ontario marriage licence is required before your civil or religious marriage ceremony. Grey Highlands CLS has the authority to issue marriage licences for marriages taking place in Ontario and expires three (3) months from the date of issue. With the busy season for marriage licenses just about to commence, CLS has already processed 12 marriage licenses.

**Municipal Elections:**
The Clerk has the statutory role to conduct the municipal election every 4 years. Under the Municipal Elections Act, the clerk of the municipality is responsible for conducting elections. This includes preparing for the election, preparing for and conducting a recount, maintaining peace and order in connection with the election and preparing and submitting necessary reports. In many municipalities, numerous additional staff are hired to oversee the administrative aspects of the preparation and conduct of a municipal election to cover the various tasks and duties required for the implementation. Some such duties include:
• Procurement of services (i.e. tabulator or internet voting services)
• Creation of forms required (25 different forms were created)
• Accepting nominations and review of qualifications
• Provision of notice of Maximum Campaign expenses
• Provision of notice of official list of Candidates and declaration of election
• Review and correction of errors on the Preliminary List of Electors
• Receive applications to amend the Voter’s List and provide on-going updates to the List.
• Responding to queries about election processes and sign requirements
• Responding to election sign issues
• Training of election officials
• Preparation for polling stations
• Creation of Accessibility Report
• Creation of Candidate information Guides
• Attendance at polling stations
• Increased office hours during election period
• Creation and distribution of election information to electors
• Advertising Election period and processes
• Etc.

Preparations for the next Municipal Election commences in the year following the most recent election. It should be noted that CLS did not hire any additional personnel in the conduct of the 2018 municipal election, however assistance was obtained from various departments.

**Ontario Wildlife Damage Compensation Program:**
Livestock owners that experience damages (injury or death) to their livestock from wildlife may be eligible for compensation for the value of the livestock under the Ontario Wildlife Damage Compensation Program. This is a Provincial program that is administered through CLS. So far in 2019, CLS has administered 14 claims under the program.

**Line Fences Act Administration:**
CLS oversees the process for assigning "Fence-viewers" to attend during a Line Fences Act dispute. The purpose of the Line Fences Act is to provide a procedure for the resolution of line fence disputes between the owners of adjoining properties. Line fences are fences that mark the boundary between properties and are often referred to as boundary or division fences. The Act does not deal with disputes about fences that are not on a boundary line or when the boundary line is in dispute.

**Lottery Licensing:**
In Ontario, the Alcohol and Gaming Commission of Ontario (AGCO) is responsible for regulating and overseeing licensed lottery events, such as bingo, raffles and the sale of break open tickets conducted by charitable and religious organizations to raise funds to support charitable purposes. The Registrar of the AGCO has
delegated authority to CLS to issue licenses for most lottery events in the community. This process involves:

- Eligibility Review for new applicants and regularly there after when any changes occur in the organization
- Application review to ensure AGCO requirements are met
- License Issuance
- Ticket and Stub Review
- Report Review to ensure license was held in accordance with AGCO requirements under the charitable mandate and funds held and used appropriately,

**Access and Privacy**

**MFIPPA Compliance:**
The Municipal Freedom of Information and Protection of Privacy Act provides that a Municipality must not only provide information to the public, but must also protect the privacy of its residents. This is a balancing act in which measures are put in place to ensure the requirements are met.

Through a structured Freedom of Information (FOI) request, members of the public can request any records in the care and control of the Municipality. All requests must be researched and responded to within 30 days.

**Education and Awareness of MFIPPA:**
The Clerk’s Department handles many requests from other departments related to routine disclosure requests. Whenever possible, the Clerk’s department will recommend that general records held within the municipality be released if readily available (and meeting specific requirements) without the need for the formal FOI process. The Clerks Department aims to have an Access and Privacy program, which will include guidance documents for routine disclosure drafted and in place by the end of 2019.

Without a strong privacy program, the organization risks the loss of trust with citizens, residents and stakeholders. A properly designed and implemented program will help develop solutions before issues arise, as well as, identify and contain situations to minimize impact.

With the increasing amount of personal information collected and managed by the municipality, particularly around increasing interactive tools and applications being developed and researched to enhance services and engage the public, it is essential to reiterate the requirement for privacy that helps mitigate risks and ensures compliance.
**Records and Information Management**
Records and information management are the foundation of an accountable and transparent municipality as it facilitates both internal and external information exchange. Grey Highlands subscribes to a common system of classification known as The Ontario Municipal Records Management System (TOMRMS). This provides for classification of municipal records, and the associated retention periods within those classification schemes based on current legislation. This system provides the Municipality with current, up to date legislation. CLS provides the Corporation with policies and training in the use of the systems, retention of documents and the processes for destruction once retention periods have been met. There has been minimal movement in this front as it is not a very “prominent” or “exciting” project, however the need for compliance is great and thus additional staff time is being allocated to this.

**Paper Records Management:**
The Municipality is moving towards more environmentally friendly initiatives including the reduction in the use of paper-based records. In the meantime, current and past paper documents must still be managed for research, retention and retrieval. The Municipality has 3 active filing areas maintained and classified through TOMRMS. These paper records (Physical files) are coded in accordance with TOMRMS. When retention periods are met, and the documents have not been flagged for archival selection, CLS oversees the appropriate destruction of the records in accordance with the legislation.

**Electronic Document Records Management:**
The Municipality uses a program called Versatile along with the Municipality’s Network Drive to classify the records held by the Municipality. The Municipality recognizes the increase in search and availability of records in their electronic form as opposed to the paper files and are moving to provide for conversion of frequently used paper files into electronic formats.

**Records Retrieval**
Records housed in the main filing area are accessed by municipal staff and signed out appropriately. In cases where records have been placed in secondary storage, or archived, the Clerk’s Department assists in the retrieval process.

**Records Archivist:**
Some documents that may have met the legislated retention period, may have archival value. The Clerk’s Department facilitates the movement and storage of these documents to the Grey Roots Museum and Archives and maintains a listing of records held in that facility.

**Information Technology**

**Help Desk Support:**
In the 2019 budget, Council allocated funds for a part-time IT support person for the Corporation. After further costing and personnel review, the municipality was
able to secure the services of a full-time IT support help desk for the corporation at a lesser cost. This help desk process was rolled out the beginning of June 2019 and continues to be a value-added benefit to all staff in the Corporation.

**Server, Network and Internet Administration:**
CLS provides for the administration of server and internet services for the Corporation including the provision of a cloud-based server, provision of software for daily municipal administrative uses and internet and wireless services. CLS manages all user accounts for the network and applications.

**Telephone Administration:**
CLS oversees the provision and maintenance of office and mobile telephones for the corporation. This includes updating main phone messaging, updating personnel extensions, researching new methods for telephone communications, ordering and setting up phones for new employees and Council members at the end of a contract or upon new hire, negotiating rates for mobile phone services. CLS staff is currently working on a telephone use guidebook for municipal staff in order to get the most out of the telephone system currently in place.

**Cyber Security**
Increasing cyber threats have been prevalent even in the smallest of Municipalities. CLS has been working diligently to mitigate cyber security risks to the Municipality. This work has provided the municipality with the knowledge to be informed on the prevalent exposures in order to ensure the appropriate security programs are in place to mitigate such risks and have the tools and practices in place to fight new and emerging threats.

**Website and App Administration**
In 2018, Grey Highlands procured a new service provider to update and recreate the Municipal Website. CLS oversaw the migration of information and the creation of new pages and new information. The current website now meets all legislative requirements in the area of Accessibility. Updates occur continually as we receive input and valuable information from staff, residents and other area stakeholders.

In 2019 the Clerk’s department created the Grey Highlands App in house. This saves the Municipality thousands of dollars versus securing this provision and hosting through external means. The App has been downloaded over 700 times and provides a mechanism for bringing GH Services to our residents’ fingertips. We estimate with this number of downloads that approximately 10% of households in Grey Highlands has at least 1 member of their household connecting to Grey Highlands through our app.