



CORPORATE SERVICES *Staff Report*

REPORT NO: COR-2025-29
TO: Council
SUBMITTED BY: Greg Clark, Director of Corporate Services / CFO
PREPARED BY: Kaitlin Bos, Manager of Legislative Services / Municipal Clerk
REVIEWED BY: Harold O'Krafka, Acting Chief Administrative Officer
DATE: June 2, 2025
SUBJECT: 2025 In-Year Operating Budget Request – Records and Information Management Co-ordinator

RECOMMENDATION:

THAT Report COR-2025-29 2025 In-Year Operating Budget Request – Records and Information Management Co-ordinator be received for information; and,

THAT Council approves the in-year operating budget request for the Records and Information Management Coordinator position with an in-year budget impact of \$10,000 for 2025.

BACKGROUND:

In September 2022, the then Information and Legislative Services Department added a permanent full-time position of Administrative Clerk to their department, the approved Job Description is included as Attachment A. This position was brought in to assist the then Municipal Clerk and Deputy Clerk with a variety of duties while the department was being re-aligned. This position assisted with the 2022 Municipal Election, and primary duties included performing general administrative functions to help support the operations of the Legislative Services Division.

Since the creation of this position, the Information and Legislative Services Department was brought under Corporate Services. There have been a number of staffing changes and with a vacancy in the Administrative Clerk position, Corporate Services Management is asking Council to consider an in-year operating budget adjustment to align this permanent full-time position better for the current business needs of the Legislative Services division.

Over the course of the past few years, staff have identified the need for a structured document management program for Township's digital and information assets. As such, staff have been working towards implementing a Corporate Records and Information Management Program (CRIMP) to align with municipal best practices and achieve overall legislative compliance.

Overall, the purpose of a robust and comprehensive CRIMP is to deliver the following benefits to the Township of Wilmot:

- increased efficiency and effectiveness
- improved service delivery.
- savings in administrative costs.
- improved access to information for informed evidence decision-making.
- compliance with various legislation including the Municipal Act, Municipal
- Freedom of Information and Protection of Privacy Act as well as operational requirements and standards; and,
- support for transparency and open government.

While the *Municipal Act* (MA) does not specifically require an employee of a municipality to be responsible for the management of the municipality's records, Sections 254 (1) and 255 of the MA do require a municipality to retain and preserve records in a secure and accessible manner, and to establish retention periods for records in order to destroy records in accordance with those retention periods. These requirements form the foundation of a robust and comprehensive CRIMP. To support this legislative requirement, in 2021, the Township adopted by By-law The Ontario Records Management System (TOMRMS), which provides a records classification system complete with records retention schedule.

With hundreds of thousands of records held by the Corporation, staff believe it is prudent to implement a digital solution to manage its information assets. This capital project was envisioned as a two-pronged project: implementation of a digital Council meetings, agenda and minutes management system, which was completed in 2021/2022, followed by an Electronic Digital Records Management System solution for all other corporate and operational documents and records, which is ongoing. These two distinct solutions are critical components in the development and implementation of a CRIMP for an organization the size of the Township of Wilmot.

In 2023, Council approved the procurement of a physical and electronic records management software. This is being piloted in Legislative Services this year with intentions of rolling out the program to additional divisions in 2026. This project also includes the data migration from our current Corporate Records Repository to an EDRMS.

This multi-year corporate wide initiative will assist with the implementation of the TOMRMS classification across all service areas of the organization, and the retention and preservation of records in a secure and accessible manner. The current capital investment in the modernization of our records and information management program is around \$200,000.

Corporate records and information management is a core function of Legislative Services. The project is a significant undertaking and will impact all areas of the organization and the public. The CRIMP recognizes the Township's ongoing commitment to the management of records and information as a "program" and not as a "project" with a defined start and end date.

The Township's CRIMP will never be perfect, so continuous improvement needs to be the goal. This is achieved via benchmarking against industry best practices and staying abreast of

emerging trends in the fields of records and information management, archives, and access and privacy as well as changes in legislation that affect the individual CRIMP elements.

REPORT:

Corporate Services is requesting an in-year operating budget adjustment to help facilitate the hiring of a full-time permanent Records and Information Management Co-ordinator position to better align with the business needs of the organization and assist in advancing Council's investment in the implementation of data migration, records modernization project and Corporate Records and Information Management Program.

Per Corporate Governance Policy HR-002 Policy on the Hiring and Termination of Township of Wilmot Employees new positions must first be approved in the annual budget before any recruitment begins. Therefore, this in-year budget request is being presented to Council to restructure an existing full-time permanent position to a position that aligns with the investments and initiatives Council has funded in the records and information management space. The vacant Administrative Clerk position would be eliminated from the staffing composition of the Legislative Services division with the job duties being handled by existing staff. The Level of Service Staffing Request is included as Attachment 2. The job description as reviewed in alignment with HR-002 policy is included as Attachment 3.

Staff are requesting this in-year adjustment to adequately staff the records management modernization project, and the Corporate Records and Information Management Program moving forward. The records management modernization project, including physical and electronic records management software and EDRMS transition, is set to begin this summer. Staff believe it would be opportune to have this position filled before the 2026 Budget cycle to enable the position to contribute their knowledge of records management principles, procedures, best practices and record keeping requirements to the project. This positions involvement at the early stages of this project would also enable them to receive the training and information on the new systems from the procured software experts to enable them to better communicate and train other departments on the system as the migration occurs.

ALIGNMENT WITH THE TOWNSHIP OF WILMOT STRATEGIC PLAN:

Trustworthy Leadership

FINANCIAL CONSIDERATIONS:

Currently a position exists within Legislative Services at a Grade B, Staff are asking that Council approve the existing position be increased to Grade D. Approval of the new position would have an impact of approximately \$10,000 during 2025, which can be accommodate within the Corporate Services overall budget based on existing vacancies.

In 2026 the impact would be \$20,150, which would be included the budget for approval.

ATTACHMENTS:

- Attachment A: Administrative Clerk Job Description
- Attachment B: Level of Service Staffing Request – Records and Information Management Co-ordinator
- Attachment C: Records and Information Management Co-ordinator Job Description