



## CORPORATE SERVICES

### *Staff Report*

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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

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#### 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



Job Description JD-CORP-013	
Department: Corporate Services	
Job Title: Administrative Clerk	
Reports To: Supervisor of Legislative Services/Deputy Clerk	Revision Date: July 2024
Direct Reports: None	

## GENERAL PURPOSE

Reporting to the Supervisor of Legislative Services/Deputy Clerk, the Administrative Clerk is responsible for performing general administrative functions to help support the operations of the Legislative Services Division. Key responsibilities include compiling agendas, preparing follow-up correspondence (including preparing letters and memorandums), and responding to public and staff inquiries. Additionally, this position will provide administrative support, including research and compiling background information, arranging, maintaining standard operating procedures, responding to inquiries/communications, and acts as back up for customer services, answering frontline phone calls and assisting individuals in person and the front counter.

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## MAJOR RESPONSIBILITIES

- Assists the Deputy Clerk with the preparation of Council/Committee agendas and minutes.
- Assists with the preparation of the annual Council/Committee meeting calendar and sending out meeting invitations to Council and staff.
- Coordinates delegations and presenters for Council/Committee meetings including creating and sending out electronic meeting invitations.
- Prepares and distributes all post-meeting correspondence, resolutions and official records relating to decisions of Council/Committees.
- Prepares by-laws for inclusion on agendas and processes by-laws passed by Council.
- Prepares statutory notices (e.g., notices of hearings, notices of passing).
- Receives and processes appeals for quasi-judicial tribunals and assists with Drainage Act process.
- Updates website content for the Legislative Services Division.
- Acts as a Deputy Commissioner of Oaths as authorized by statute including the commissioning documents.
- Provides back-up to the Administrative Assistant/Receptionist as follows:
  - Marriage licensing – Acts as a Deputy Issuer and may be delegated to perform marriage ceremonies under the direction of the Manager of Legislative Services, Municipal Clerk as necessary
  - Death registrations – Acts as a Deputy Division Registrar under the Vital Statistics Act.
  - Front counter services
- Acts as a Lottery Licensing Officer; receives and reviews lottery license applications; ensures eligibility and compliance with Alcohol and Gaming Commission of Ontario regulations; issues licenses; completes provincial reports as required.

- Provides records management services including file retrievals and transfers from inactive storage, authorized destruction.
- Provides administrative services for the Township's electronic agenda management system.
- Assists with the preparation of documentation for the Legislative Services Division, including the creation and maintenance of standard operating procedures.
- Conducts research as requested to provide background information on issues under consideration by the Supervisor of Legislative Services/Deputy Clerk and Manager of Legislative Services/Municipal Clerk.
- Acts as Assistant Returning Officer for municipal elections and performs various functions relating to the municipal election as assigned.
- Answer public and staff inquiries through the Clerk general inbox in a timely manner, ensuring any legislative requirements are met.
- Performs other duties as assigned by the Manager of Legislative Services, Municipal Clerk.

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## **QUALIFICATIONS**

- 2-year diploma in a related field (e.g., Office Administration, Public Administration).
- Minimum two (2)-years' experience in a related field.
- Strong written and verbal communications skills and proven ability to interact with staff and external stakeholders.
- Ability to work independently and effectively in a team environment.
- Demonstrated organizational and planning skills as well as the ability to effectively multi-task to consistently meet legislative deadlines.
- Attention to detail and a high level of accuracy.
- Strong customer service skills and demonstrated ability to effectively, tactfully and diplomatically deal with and resolve difficult situations with customers, applicants, appellants and delegations.
- Demonstrated proficiency with Microsoft Office 365 Suite (Outlook, Word, Excel, Access and PowerPoint), Adobe Pro.
- A clean Criminal Record Check is required upon hire
- The following qualifications will be considered an asset:
  - experience reading, interpreting and applying policy and governance documents, preferably in a public sector setting will be considered an asset.
  - Experience with Board, Council and/or Committee secretarial functions, processes and protocols including preparing agendas and minutes, drafting statutory notices and correspondence, coordinating meetings and electronic appointment scheduling will be considered an asset.
  - Experience with document management platforms such as Microsoft SharePoint, eScribe and TOMRMS (The Ontario Municipal Records Management System).

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## **WORKING CONDITIONS**

- Frequent difficult customer issues and dealing with escalated concerns from the public, some of whom can become emotional depending on the nature of the issue.
- Generally, works in an office or home environment at a computer workstation.
- Work is subject to mandatory and/or legislated deadlines.
- Handles personal and confidential information in accordance with legislated requirements.
- Sometimes required to work evenings to attend Council/Committee meetings as well as perform election functions.
- Increased volume of work and competing priorities exist as a result of election duties over an 18- month period preceding and during each municipal election (every four years).

**TOWNSHIP OF WILMOT**  
**2025 In-Year Operating Request Form**  
**Records and Information Management Co-ordinator**

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**Department:** Corporate Services

**Request Name:** Records and Information Management Co-ordinator

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**Description:**

To hire a full-time Records and Information Management Co-ordinator.

**Justification:**

A Records and Information Management (RIM) Co-ordinator would ensure efficient and compliant management of the corporation's records and information assets. This role is crucial for compliance with legal requirements (e.g., MFIPPA), protecting citizens' rights, and improving efficiency through proper information organization and access.

**Compliance with Regulations and Legislation-** Municipalities are subject to various regulations, including the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), which necessitates proper handling of records and information. A Records and Information Management Co-ordinator ensures compliance with these laws and related regulations, minimizing legal risks.

**Efficient Information Access-** The RIM Co-ordinator can streamline information access for staff, council members, and the public, leading to improved decision-making and service delivery. This includes creating and maintaining a robust records management system, making information easily retrievable.

**Privacy protection-** The proper management of information protects the rights of citizens, especially in relation to privacy and access to information. The RIM Co-ordinator plays a key role in ensuring that privacy impact assessments are conducted and that appropriate measures are taken to protect sensitive data.

**Cost savings-** Efficient records management can lead to significant cost savings by reducing storage costs, minimizing time spent searching for information, and improving compliance with regulations.

**Strategic Alignment-** The RIM Co-ordinator can work with different departments to ensure that records and information management aligns with the municipality's strategic objectives, promoting a data-driven approach to decision-making.

**Modernization and Digitization-** The RIM Co-ordinator can lead efforts to modernize and digitize records, improving accessibility and reducing reliance on physical files.

## **TOWNSHIP OF WILMOT**

### **2025 In-Year Operating Request Form**

#### **Records and Information Management Co-ordinator**

**Training and Communication-** The RIM Co-ordinator can provide training and communication to staff on records management best practices, ensuring that everyone understands their responsibilities within the Corporate Records and Information Management Program.

**Risk Management-** Proper records management helps mitigate risks related to information security, legal liabilities, and reputational damage.

#### **Risk of not proceeding:**

The risk of not proceeding is the inability to carry out the Corporate Records and Information Program, data migration and records modernization project. Failing to continue to invest in the success of this program area could lead to significant risks to the corporation including operational inefficiencies, compliance issues, security breaches, data loss, and unauthorized access.

#### **Options Considered:**

Options considered include continuing the current approach to records and information management off the corner of desks. As the data migration and records modernization project starts this summer, the working hours and attention needed are significantly more than anticipated and is not feasible to continue in this manner. Another option considered was to pause the data migration and records modernization project until adequate staff time and resources are available, staff do not believe that is in the best interests of the corporation. Staff also considered waiting for the 2026 Budget cycle, this would be costly in delays and progress, 2026 being an election year it is also a busy time for Legislative Services so onboarding an employee and getting them caught up to speed on the project would be a challenge.

#### **Financial Considerations:**

2025 Corporate Services Compensation Adjustment

\$10,000



**Job Description**

**Department:** Corporate Services

**Division:** Legislative Services

**Reports to:** Supervisor of Legislative Services / Deputy Clerk

**Position Status:** Full-time, permanent

**Salary:** \$69,996.23 – 85,050.40 (2025 Salary Grid)

**GENERAL PURPOSE:**

Reporting to the Supervisor of Legislative Services / Deputy Clerk, this role is responsible for assisting with the development, implementation, and maintenance of the Township's Corporate Records and Information Management Program (CRIMP) for all electronic and paper records. This position also provides records and information management consultation, education/training, advice and guidance to Township staff regarding records management policies, practices and procedures. The Records and Information Management Coordinator is also responsible for coordinating Freedom of Information requests (FOI) in compliance with the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) as well as other aspects concerning access and privacy. Other duties include general administrative tasks and providing support to the Clerk for election matters.

**RESPONSIBILITIES:**

- In consultation with the Supervisor of Legislative Services / Deputy Clerk and Manager of Legislative Services / Clerk, assist in the design, development and maintenance of the CRIMP and associated policies and procedures to achieve legislative compliance and operational requirements.
- Responsible for the day-to-day operation, maintenance and continuous improvement of the Township's CRIMP for both paper and electronic records.
- Responsible for the day-to-day operation, maintenance and continuous improvement of the Corporate Records Repository and Electronic Documents Records Management software.
- Provide advice and consultation, training and education to staff about the CRIMP.
- Provide advice and consultation, training and education to staff about document accessibility and AODA compliance.
- Perform records analysis of records being created, used, maintained and stored in each department, and ensure the Records Retention Schedule is updated accordingly.
- Make recommendations to departments to improve business processes relating to records management practices based on industry best practices.
- In consultation with the Supervisor of Legislative Services / Deputy Clerk and Manager of Legislative Services / Clerk, develop and implement records classification structure (TOMRMS) and file naming conventions for records, and maintain an orderly and efficient repository for electronic and paper records.
- Promote best practices in electronic records management and migrate paper records to electronic storage where appropriate.

- Ensure the creation, maintenance, storage, retention, retrieval and disposition of all Township records meet legislative requirements.
- Assist with the development of training materials, manuals, presentations and programs for employees on records management systems, procedures and processes as well as access and privacy.
- Administer and provide assistance to staff with respect to automated electronic records and information management software.
- Process departmental requests to retrieve, distribute and return records as well as coordinate record transfers to or from inactive storage and authorized destruction of Township official records.
- In consultation with the Supervisor of Legislative Services / Deputy Clerk and Manager of Legislative Services / Clerk, ensure appropriate indexing and storage of all Council and Committee records including agendas, minutes, reports, by-laws, resolutions, and correspondence.
- Oversee the accuracy and integrity of records and metadata for paper and electronic records according to established policies and procedures.
- Plan and coordinate the development and implementation of a vital records plan to ensure essential records are appropriately protected and accessible; and support the Township's business recovery plan.
- Support related procedures and requirements associated with risk management and data security.
- Implement procedures and security of archival records and materials.
- Coordinate and process formal Freedom of Information requests in accordance with the Municipal Freedom of Information and Protection of Privacy Act and prepares timely responses for review by the Manager of Legislative Services / Clerk for release as appropriate, ensuring the confidentiality of sensitive matters and the protection of personal information.
- Assist the Supervisor of Legislative Services / Deputy Clerk and Manager of Legislative Services / Clerk with the implementation of an access and privacy program including the development and implementation of privacy impact assessment and privacy breach investigation processes and staff training.
- Under the direction of the Manager of Legislative Services / Clerk, research and prepare material for the Information and Privacy Commissioner of Ontario (IPC) annual report as well as any IPC appeals.
- Participate in all aspects of preparation and support for the municipal elections under the direction of the Supervisor of Legislative Services / Deputy Clerk.
- Acts as a Deputy Commissioner of Oaths as authorized by statute including the commissioning documents.
- Provides back-up to the Administrative Assistant/Receptionist, as necessary.
- Provides back-up support to the Supervisor of Legislative Services / Deputy Clerk and Manager of Legislative Services / Clerk at evening Council and Committee Meetings, as necessary.
- Perform other related duties as assigned.

## **QUALIFICATIONS:**

### Education/Training/Certifications

- Post-secondary degree or diploma in Records and/or Information Management, Library Science or a closely related field.
- Minimum 2-4 years related experience in records management, preferably in a municipal government or other government environment.
- Certified Records Manager designation an asset.

### Skills, Knowledge and Abilities

- Knowledge of records management principles, procedures, best practices and record keeping requirements as well as other statutory and legal requirements regarding records management.
- Experience with records analysis, retention scheduling, file classification structures and naming conventions.
- Ability to analyze record keeping systems, security and access controls and facilities; identify issues and areas for improvement and recommend policy changes, systems and equipment to address them.
- Experience working with information technology applications and systems including records management and electronic document management systems, enterprise applications (e.g., MS Office), and unstructured data sources (e.g., SharePoint and team shared drives).
- Well-versed in current trends in information technology pertaining to security, retention and destruction of various forms of physical and electronic records.
- Skill in reading, understanding, interpreting and applying legislation, regulations and standards.
- Demonstrated analytical and creative problem-solving skills to develop new and improved methods.
- Ability to exercise independent judgment and make decisions with minimal direction and guidance.
- Superior interpersonal skills including the ability to work effectively in a team environment and with all levels of staff as well as council, gain respect and confidence, negotiate effectively, build consensus and cooperate toward achieving mutual goals.
- Ability to communicate clearly and concisely, both orally and in writing.
- Experience with developing and delivering training to staff and making presentations to senior management.
- Ability to plan, organize, set priorities, accomplish tasks and meet deadlines with strong attention to detail and minimal supervision.
- Demonstrated ability to exercise significant discretion and sensitivity involving regular access to personal and confidential data/information.
- Ability to lift, carry or transport file boxes weighing up to 40 lbs.
- Class G Driver license in good standing and a reliable vehicle to use for Township business when required.
- Knowledge of TOMRMS file management system is an asset.

- Experience and knowledge of Municipal Freedom of Information and Protection of Privacy Act is an asset.
- Experience and knowledge of Electronic Document Management systems is an asset.
- Familiarity with archival practices is an asset.