

## Employee Information

<b>Employee Name:</b>	Jim Kirk	<b>Supervisor Name:</b>	Donna D.
<b>Employee Title:</b>	Manager, Service Management & Operations	<b>Supervisor Title:</b>	Chief Information Officer
<b>Business Unit:</b>	Finance & ICT	<b>Performance Review Period:</b>	FY 2014-2015

*For detailed job descriptions go to R:\HRM Common Directory\Human Resources\Job Descriptions*

### Section One: Job Specific Goals and Results

#### Operational Goal 1:

Implement a Public WiFi service within the key urban corridors of HRM (Dartmouth & Halifax)

1. Be inclusive of internal and external stakeholders with interest in Public WiFi. Establish relationships and where applicable, partnerships.
2. Deliver a Recommendation Report to Regional Council regarding the introduction of Public WiFi via an Request for Proposal (RFP).
3. Develop and Release RFP during in Q3 (Oct 1 – Dec 31)
4. Seek Regional Council approval on an RFP award and begin planning & initiation with the selected partner.

#### Results and Comments:

1. Successfully established key relationships with both internal and external stakeholders regarding the introduction of a public wifi service, led by Halifax.

Internally, worked with key Facilities Management and Street ROW managers (Diane Moulton / Taso K.) regarding the project and the role their teams could potentially play relative to leveraging existing municipal assets. Engaged with Corporate Communications regarding communication requirements and marketing/public affairs opportunities as required. Worked with infrastructure and network resources in ICT regarding details around leveraging the municipal fibre network in the delivery of the service. Worked with and supported External Affairs in its contacts with and communications to key external stakeholders groups like the Halifax Higher Education Partnership (HHEP) and the Downtown Business Commissions.

Externally, worked primarily with the Waterfront Development Commission as they were planning their own revitalization project to existing WiFi infrastructure on the waterfront. Convinced them that they should work with Halifax (and others) on a collaborative effort. Have demonstrated leadership and gained credibility especially with this group. Presented to the HHEP on numerous occasions regarding our plans and progress, stayed in contact with their primary representative / chair as the project has progressed. Liaised with the Downtown Business Commissions regarding their interests and plans. Gained concurrence with them that a Halifax-led implementation was in everyone's best interests. Presented to the PNS Chief Information Officer regarding the project to identify any synergies where possible. She was excited by our vision and was keen on participating if possible.

Cultivated relationships with the service provider community. Spent significant time and effort meeting with proponents, even before an RFI and RFP were issued. Met with Bell, Telus, Eastlink, IBM, Nova Communications, Solutions Inc., Cisco, and others regarding our desires to implement a public wifi service to act as a foundation to a smart city program. Built excitement in the vendor community regarding this endeavor.

2. Following successful Request for Information (RFI), developed a Recommendation Report to Regional Council recommending that we proceed to Request for Proposals (RFP) to identify a strategic partner to work with us on the implementation of a Public WiFi service. Successfully navigated Q&A and received endorsement to proceed

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on October 21<sup>st</sup>, 2014.

3. Developed RFP incorporating feedback received from Regional Councillors on October 21<sup>st</sup>, 2014. Issued RFP on December 16<sup>th</sup>, 2014. RFP closed on February 10<sup>th</sup>, 2015 with 4 responses from Bell Aliant, Fresh Group, IBM and Telus. Conducted all day vendor information sessions with shortlisted proponents (Bell Aliant, IBM, Telus) and am now awaiting final proposals due on May 1<sup>st</sup>, 2015.
4. Following the receipt of final proposals on May 1<sup>st</sup>, a report will be drafted for Regional Council approval regarding the implementation of a Public WiFi service for Halifax.

### Operational Goal 2:

Lead the continued implementation of IT Service Management (ITSM) best practices within ICT:

1. Implement the ITIL Change Management Process, enabled by ServiceNow.
2. Decommission legacy Change Management application currently in use.
3. Implement the ITIL Knowledge Management Process, enabled by ServiceNow.
4. Establish signed Service Level Agreements (SLAs) with each business unit and ABC receiving service(s) from ICT

### Results and Comments:

1. Successfully developed ICT's new Change Management Process and implemented in December, 2014. The process as designed now begins earlier in the lifecycle of the change allowing for a more optimal use of resources. An M3 manager responsible for a service now has to authorize the change prior to any development work being initiated thus ensuring the optimal use of ICT resources. The ICT change manager is now positioned as the final approver of changes, providing an objective approval vs. the legacy practice of allowing functional managers to approve their teams' changes. The process also allows for different levels of process rigour depending on the business risk and impact of the proposed change. This allows low impact changes to be processed much more quickly. The process has been enabled by ICT ServiceNow – this has brought tremendous improvements. Notifications flow to approvers when tasks are assigned to them and managers/approvers are now able to approve activities on the move from their mobile devices. This has shrunk the end-to-end processing time for changes significantly. Having this work better integrated into our ITSM tool has also provided a more intuitive experience to ICT staff and we are now able to link change records with incidents allowing for a new level of intelligence around the impact our changes have on production ICT services. Feedback has been overwhelmingly positive and we are just getting started with our new Change Process!
2. The legacy Change Management application has been successfully decommissioned, removing 1 application from our Application Portfolio.
3. Phase 1 of the Knowledge Management Process was implemented successfully. An ITIL Process Analyst was engaged through the ICT Standing Offer to engage ICT stakeholders around current knowledge management practices and policies (or lack thereof). A draft Knowledge Management Process Guide was developed and circulated for review within Service Management & Operations. Extensive feedback was provided and the guide was updated accordingly. The next phase of the project will be to establish knowledge documentation standards and to engage ICT staff on the documentation of standard operating procedures leveraging the new templates. Concurrently, the ITSM team will begin to capture requirements for the implementation of the Knowledgebase in ServiceNow. The initial focus will be for ICT internal knowledge. Following that, the implementation of a customer-facing knowledgebase will be undertaken leveraging the ServiceNow self-service interface.
4. Work continued with Business Units in 14-15 regarding signing formal SLAs within ICT. Successfully signed an SLA with Halifax Water for the third year in a row. Successfully negotiated and signed an SLA with Halifax Regional Police. Successfully negotiated and signed an SLA with Halifax Transit. Successfully negotiated and signed an SLA with Legal, Insurance and Risk Management Services. Human Resources will be the next to sign, followed by Finance. The Halifax Re-Org resulted in impacts to SLA leads within business units and resulted in less business availability to complete SLA activities. Anticipate having all business units under signed SLAs during the 15-16 fiscal year. Monthly SLA reporting is fully operational and flowing to business unit management contacts through the Business Relationship Managers.

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### Operational Goal 3:

Establish Microsoft SharePoint as a platform for ICT to leverage for future capabilities and client solutions and implement a SharePoint solution in support of the Council Report Process:

1. Implement initial SharePoint infrastructure with sufficient resiliency and capacity to allow for future growth.
2. Implement first SharePoint solution, a collaboration and workflow application in support of the Council Report Process.
3. Develop operating support model for SharePoint to ensure ICT has adequate resources with the appropriate knowledge to effectively support the SharePoint infrastructure and any/all SharePoint solutions.
4. Where possible, leverage SharePoint as a risk mitigation / rationalization tool for legacy applications in the ICT Application Portfolio.

### Results and Comments:

1. Implemented a scalable, fault tolerant SharePoint base infrastructure with sufficient capacity to enable future client solutions and broad spectrum capabilities. Leveraged the existing agreement with Microsoft to procure the necessary SharePoint and SQL licensing. Saved municipal budget by coming up with a creative licensing solution for the development environments (purchasing MSDN subscriptions vs. discreetly licensing the development environments). Followed Enterprise Architecture gating processes meticulously to ensure that the solution architecture was fully approved and endorsed by Enterprise Architecture. Sized the environment appropriately for next planned SharePoint implementations (i.e. Intranet / Company Portal, Extranet, Network Drive replacement).
2. Led the implementation of a workflow and content collaboration solution for the highest profile business process in the municipality – the development of public policy through Council Reports. I engaged the CIO and suggested we tackle this problem. She indicated that I “was crazy” but to “go ahead”. ☺ I resourced the team, initiated the project and steered it successfully through governance and partnership with the business lead, Stephen H. Successfully designed, developed and rolled out a pilot solution. Leveraged innovative approaches for Training where each user got exposed to the entire end-to-end process vs. traditional, role-specific training. This was critical as an issue in the way the legacy process executed was no one going through the process understood what others were responsible to do or the impact their work had on others downstream in the process. Following pilot, surveyed users for feedback and worked with steering committee to prioritize solution/process changes for the full release. On track to implement release 1.0 in early 15-16.
3. Engaged SharePoint Architect/Developer/Administrator to assist in the definition of a support and governance model for SharePoint to ensure that ICT has the roles and resources defined to effectively support the Council Report Center and future SharePoint solutions and capabilities. Directed this resource to work with team members from the Business Applications and Infrastructure teams to mentor them in the care & feeding of the core infrastructure and the support and management of the new solution.
4. Implemented Microsoft Access Services for SharePoint as a means to mitigate risk associated with legacy Microsoft Access applications in use around the municipality. Created a “migration package” for the Business Applications team to use going forward to migrate these applications to SharePoint. This approach transitions the data into a SQL server that is in our data center and properly backed up while using SharePoint forms as the front-end for that data. This not only reduces risk associated with potential data loss but also removes a long standing issue of desktop compatibility as now the application is accessed through a standard internet browser. Leveraged Microsoft scanning tools to perform a scan of the network for Microsoft Access databases. Identified approximately 150 that need to be migrated to SharePoint. Scheduled for 15-16 fiscal year.

### Operational Goal 4:

Trunk Mobile Radio 2 Project Sponsorship

1. Develop Sole Source Award report to Regional Council for the procurement of TMR2 equipment and services from Bell Mobility
2. Negotiate a long-term contract with Bell Mobility for TMR2 equipment and services.
3. Provide leadership and direction to the TMR2 project team
4. Develop a steady state support model for the best practice management and continuous improvement of the TMR2 services required by Halifax

### Results and Comments:

1. Authored Award report for Regional Council recommending sole source contract for a period of 10 years for equipment, access & maintenance for the TMR2 system. Approved by Regional Council on June 10<sup>th</sup>, 2014.
2. Led 6 months of contract negotiations with Bell Mobility resulting in the execution of a 10 year contract with Bell Mobility for equipment, migration services, access & maintenance for TMR2. The contract was a significant improvement from the TMR1 contract as it provided measurable service level targets with financial credit in the event those targets were not met by Bell Mobility. It allowed for HRM to acquire non-Motorola radios from 3<sup>rd</sup>

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parties other than Bell Mobility. It provided for a full maintenance service on radio equipment giving the municipality a single avenue for radio repair and warranty claim management (a huge improvement over TMR1 where this was the responsibility of the municipality, working with multiple vendors for repairs). It contained provisions that allows the municipality to procure coverage enhancement services from Bell Mobility even if there was not concurrence with the PNS. I also successfully negotiated highly favourable termination provisions which would allow the municipality to go in another direction in the second half of the contract for a reasonable termination fee (roughly the equivalent of 1 years worth of service).

3. Sponsored the TMR2 project, providing direct guidance and leadership to the project team through weekly meetings initially with the project manager and eventually with the entire core team. Had multiple changes to the makeup of the project team throughout the project. Removed the first Senior BA due to performance issues. Communicated changes very openly with key project stakeholders to ensure they were consulted where appropriate and informed at a minimum. Replaced this Senior BA with another contract resource who delivered quality work until an inappropriate comment was made to a female member of the core team. Stepped in and removed this resource from the project after speaking with all parties involved. Again exercised diplomacy with key project stakeholders to ensure they were aware of the decisions being made and why. Worked with the project manager in conducting active governance throughout the project – preparing for Executive Steering Committee meetings and demonstrating leadership and clarity with the Deputy Chief of Police, Fire Chief, Director of Halifax Transit and occasionally the Deputy Chief Administrative Officer acting in the capacity of Director, Transportation.
4. Developed a Hybrid Support & Delivery Model for the ongoing management and continuous improvement of the TMR2 service. This involved shifting value added activities in to ICT and removing duplication; activities like facilitating effective governance, facilitating planning, actively managing the suppliers delivering the service, managing centralized budget and bill reconciliation, managing the lifecycle of tangible capital assets used in the delivery of the service, and service reporting. This also leaves key activities in the hands of the business; activities like improving the state of interoperability, participating in effective governance and participating in joint planning efforts. This support & delivery model will be supported by the creation of two positions within ICT – the Lead, Public Safety Telecommunications and an ICT Billing Analyst. These positions are in draft and will be added in 15-16. Presented this hybrid support & delivery model to the Executive Steering Committee and received approval to proceed. Have engaged Finance regarding analysis necessary to identify the budget quantities to transfer to ICT's 15-16 operating budget. Anticipate this transfer being completed in early 15-16, similar to last year's landline centralization.

### Operational Goal 5:

Miscellaneous Service Improvements, Upgrades & Planning Activity:

1. Implement Microsoft Lync for Instant Messaging, Audio/Video Conferencing, Meeting Facilitation and Presence
2. Continue investments in Meeting Room Technology within current funding envelope
3. Transition iVos hosting from Bell Aliant to internal HRM/ICT hosting
4. Implement technical upgrade of FDM to latest version of the software (Win6: at this stage, no UI changes)
5. Implement enhancements to HRM's core network, creating more redundancy / higher availability
6. Complete Xerox Managed Print transition
7. Finalize Mobile Workforce Strategy and update ICT Service Management & Operations 5 year plan accordingly with mobile initiatives required to achieve strategy
8. Complete current state assessment of Data Centre Operations along with capital investments required
9. Complete Office 365 business case (Microsoft Cloud Services)
10. Complete Backup Modernization Project
11. Implement new Province of Nova Scotia Voice Services Contract
12. Implement Alternative Service Delivery on Personal Computer Deployments
13. Modernize Patch Management processes and tools used to patch both personal computers and servers
14. Implement Microsoft's infrastructure monitoring/management platform (SCOM)
15. Develop and Implement a Stabilization Plan for HRM's Email system – revised policy, supporting technical configuration and a organizational change management plan
16. Implement upgrade to GIS to version 10.2.1
17. Implement upgrade to Public Police Crime Mapping application (more crime types, longer time duration)

### Results and Comments:

1. Microsoft Lync implemented successfully in October, 2014. Deployed Lync to over 2,000 PCs. Worked with Corporate Communications on a detailed communications and change management plan. Incorporated fun into the go live activities with team T-shirts and live support being provided out of boardrooms in Duke Tower and Alderney Gate. On March 31<sup>st</sup>, 2015 launched official, standard Lync accessories to improve the user experience

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- a standard enterprise Webcam and Wireless Headset. Meeting Room enablement to follow in 15-16.
- 2. Officially chartered “Meeting Room Technology” as a Project Lite to finalize the details necessary to create a truly managed service for Halifax business units. 13-14 implementations saw 8 meeting rooms completed. 14-15 implementations saw an additional 17 meeting rooms enabled with standardized technologies (display, control system and audio conference capabilities). In progress of working with PNL Communications to identify hardware necessary to make meeting rooms Lync enabled. To follow in 15-16.
- 3. Completed successfully yielding 30k of savings per annum (Legal, Insurance & Risk Services budget)
- 4. Completed successfully.
- 5. Completed successfully with minimal impact to municipal users. These investments provide more redundancy in our core network, allowing us to perform more proactive maintenance without negatively impacting all municipal users. New network design was reviewed and signed off on by Cisco.
- 6. Managed Print Service implementation completed. Deployed 229 managed print devices. Implemented active operational governance with Xerox (quarterly performance meetings). Optimized invoicing and billing. Got a handle on monthly burn rate for the service – identified and communicated over expenditure to CIO. Identified legacy print devices still on lease that need to be removed to reduce expenditure. Plan in progress.
- 7. Mobile Workforce Strategy completed in draft, despite the removal of a key resource from the project (Senior BA). Secured replacement resource who produced a second draft that was significantly improved from the first. Circulated for feedback within ICT. Feedback provided was that more work was required to tell our Mobile story. Secured management consultant through statement of work to take this piece of work home. Will finalize in 15-16.
- 8. Deferred due to lack of capital funding due to cost overrun on Backup Modernization Project.
- 9. Initiated first phase of this business case relative to “outside workers”; namely volunteer fire fighters who were provided with Active Directory accounts and Exchange mailboxes. Must be completed and approved by CAO prior to 2015 Microsoft True-up. Will be finalized in 15-16.
- 10. Backup Modernization Project continues due to issues with design provided by HP/ABM. This delayed implementation. Anticipate full implementation of new backup solution in early 15-16 at which point the legacy system will be moved from the records center back to the Duke Tower data center where it will only be used for long-term tape backup for disaster recovery purposes.
- 11. New voice services contract delayed extensively due to review of procurement process by the PNS. Negotiations initiated in February, 2015. Anticipate completion in early 15-16. The new rates negotiated will generate approximately 200k in savings per year.
- 12. In progress. Vendor (IMP) engaged. Value added services required defined. Procurement vehicle established in concert with Stephen T. What is outstanding is the definition of the provisioning process and detailed procedures around asset deployments. Will be completed when new Manager, Computing & Telecommunications is recruited in early 15-16.
- 13. Significant improvement in patch management processes and procedures implemented in 14-15. On the desktop side, a monthly cadence was established with an initial deployment of patches to a staging area for Application Administrators to “smoke test” prior to full corporate deployment. Communication products refined and delivered more consistently. On the server-side, automation of patch deployment enabled through SCCM. Prior to 14-15, security patches were deployed manually, server-by-server. Very inefficient.
- 14. Microsoft SCOM implemented successfully using Project Lite. This allows the System Administrators to be more proactive as they now receive alerts when thresholds/tolerances are being met on server infrastructure allowing them to take corrective action prior to a failure taking place negatively impacting customers.
- 15. Email Stabilization Plan continues to be in progress. Significant headway has been made in Email Records Retention policy discussions with Legal, Access & Privacy and Corporate Information Management. Led the design of a solution that meets all parties requirements. Pending finalization of the policy and implementation of the new technical configurations in Microsoft Exchange and Netmail Archive. Will be finalized in 15-16.
- 16. GIS (and Oracle) upgrades completed successfully. Worked very closely with Halifax Water to align with their development pipeline and minimize impact to their operations and ongoing development.
- 17. Upgrade to the Public Crime Mapping GIS application completed successfully. Unfortunately these changes (expanded date range, new crime types and mobile friendly design) have not been released to production due to a privacy review by HRP.

*See communication from CAO*

## Section Two: Corporate Goals and Results

### Corporate Goal 1: Finance & ICT 3.5

Position SAP as HRM’s Administrative Enterprise Resource Planning (ERP) tool and enable future operational and capital investment in the platform:

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1. Execute on a much needed functional upgrade to SAP – bringing the software to the currently available release (EHP7). This will remove a previous obstacle to implementing additional capabilities in SAP (pre-requisites).
2. Optimize monthly release planning processes to ensure ongoing improvement of existing SAP landscape while also ensuring value for money from PNS/IBM.
3. Support the delivery of SAP capital projects during the year (i.e. Fleet project, Health & Safety Reporting)
4. Investigate and develop a plan for the implementation of Employee and Manager Self-Service with an initial focus on Human Resources. This will support the planned changes to their HR delivery model.
5. Attend Sapphire with business and ICT resources to further solidify partnership around leveraging SAP to transform the business processes and service delivery within the municipality's administrative units (i.e. HR & Finance).

### Results and Comments:

1. Successfully implemented significant functional upgrade to SAP, moving from ECC6 (EHP0) to EHP7. Halifax became the first customer of the provincial SAP landscape to move to EHP7. Led the initiation of the project through the SAP Service Management team at the PNS and steered the project through joint governance. Successfully deployed EHP7 in development and coordinated extensive testing with the business; leveraging the test framework established in 13-14. Final release to production occurred in early July with little impact to the business. Minor defects were identified post implementation and resolved by the PNS and IBM. This removed the last dependency necessary for Halifax to begin exploiting SAP with future projects (ESS/MSS, Employee Health & Safety, etc). Initially estimated project at \$500,000. Came in under budget at \$365,000. Residual funds reinvested elsewhere in the Application portfolio.
2. Monthly release planning processes continued to mature in 14-15. An increased level of engagement with the business was observed when we officially cut over to the new monthly release cycles. Leveraged monthly releases to continue implementing an improved access & security model to meet the recommendations in the Auditor General's report. Also used operational release capacity to implement pre-requisite improvements for a 15-16 implementation of ESS/MSS.
3. Supported the implementation of the Fleet Project and Employee Health & Safety Reporting projects in 14-15:
  - a. **Fleet:** Played a leadership role during the early phases of estimation/negotiation with IBM regarding the development of the Fleet Focus / SAP interfaces. Met directly with both the project team and IBM to facilitate a positive outcome for Halifax. Also negotiated a statement of work with IBM for a resource to perform business support on Fleet Interfaces following go-live. Engaged with the Business Relationship Manager on the need to transition this business support to an internal resource in the business following the first 6 months of operational support.
  - b. **Employee Health & Safety:** Worked with the Project Manager regarding the procurement approaches that could be leveraged for both the software acquisition and the implementation services required to implement the EHSM module in SAP.
4. Worked with the Business Relationship Manager on the resources for and approach to an engagement to establish a preliminary plan for a 15-16 implementation of ESS/MSS for Halifax. Supported the resource procured to work with HR and reviewed/provided feedback on the go forward plan.
5. Attended Sapphire with business unit and ICT staff to better understand SAP's change in strategy ("Run Simple"). Spent a significant amount of time with the Manager, Total Compensation on strategies and approaches to supporting HR's service transformation and navigating SAP's transition to cloud-based services (i.e. Success Factors). Also spent time investigating / researching SAP's new user interface strategy with SAP Fiori and Screen Personas. On return from Sapphire, I facilitated a meeting with the other attendees to flush out a presentation regarding what we collectively learned and how this influences our go forward thinking relative to SAP improvement.

### Corporate Goal 2: Finance & ICT 3.1

Lead and supported significant organizational change within ICT in support of our continued transformation to an Enterprise-class service provider of Information, Communication & Technology services.

### Results and Comments:

1. Terminated the Manager, ICT Asset Management as he was both ineffective and not a fit with the type of manager and leader ICT needs to transform its culture and service delivery.
2. Redeveloped the legacy job description for this position entitling it the "Manager, Computing & Telecommunications Services", authored the business case and sought organizational approval to recruit a replacement. Successfully navigated Job Evaluation processes to have job rated at a higher level – EM3 vs. EM2.
3. Acted as the Manager, Computing & Telecommunications Services from the period of September to Present on

## Section Two: Corporate Goals and Results

top of existing duties. Despite this, increased the level of engagement on the team and built a tactical refresh plan for 14-15 which identified 500 assets due for refresh.

4. Led the team of three managers finalizing new and updated Team Lead position job descriptions. Synergized the job descriptions to the best of my ability. Authored the business case for the approval of these positions. Led the discussion at Job Evaluation to get the jobs rated correctly. Ended up attending Job Evaluation twice and lobbying the Manager, Total Competition offline to get the rating where it needed to be. Successfully got an EM2 rating so the positions could be posted.
5. Spent significant time with the Manager, Technology Infrastructure mentoring him on adjusting his management approach and being more open-minded about future change to his section. My work with him has yielded very noticeable improvements in his demeanor, attitude and behaviors over the last two performance cycles. In two years he has gone from a manager on the outs to an active contributor to our agenda of transformation.
6. Invested time in key up and comers within ICT. Met with Victor Z. quarterly regarding his career ambitions; providing guidance and mentorship where possible. Continued to meet with and support Todd S. on a monthly basis in his continued work with the province, IBM and Halifax business units. Met regularly with Jennifer H. to offer guidance regarding her career ambitions and how to deal with the perceptions (often negative) of ICT staff relative to her performance and progression.
7. Continued to improve overall communication and staff engagement through candid and transparent quarterly division meetings. Tackled difficult topics like how I evaluate the performance of staff and tried to demystify key elements of the work place like recruitment and org change processes. Focused in on team accomplishments and also recognized individual achievement. Brought project teams in to present to the team in advance of Go Live. Established a wonderful rapport with my team in those meetings – any question was fair game. I shied away from nothing.

Entered %firstname% %lastname% into Performance Management. Initiated a formal Performance Improvement Plan in collaboration with Human Resources. The first two months of her plan yielded improved performance. The last month saw a return to previous attitudes and behaviors. Worked with HR to extend her plan for a 4<sup>th</sup> month. Meticulously documenting issues with her work and gathering feedback from other resources in ICT to support a potential case for termination. Have spoken very candidly with %firstname% regarding her performance and the perceptions of her in the work place. Difficult conversations that I did not shy away from.

For complete definitions of leadership competencies and levels go to:

<http://insidehrm/BusinessUnits/HumanResources/Documents/Leadershipcompetencies.pdf>

## Section Three: Leadership Competency

### Values and Ethics

Creating and supporting the principles and values of the organization and the municipality as a whole.

#### Comments:

My view on Values and Ethics is relatively simple – it's about doing the *right thing*. As a leader and manager in a large organization like HRM, the act of doing the right thing is more challenging than the intent. The right thing will often be unpopular and it will almost always be difficult. Successful leaders stay focused on what's right and lead the change necessary to accomplish that.

### Performance Development:

With four years in the books with the municipality, I feel like I have a better sense of the core values and ethics of the organization. I have established strong, respectful relationships with everyone and believe I have established a positive reputation for being honest, ethical and doing what's right, even when it's hard.

### Achievement Motivation

Focuses efforts on working well and/or competing against a standard of excellence while achieving high quality results.

#### Comments:

As a leader and manager, I am focused and goal oriented. I *need* to know how I'm doing (and how the people, functions, processes and systems I'm responsible for are doing) so I can understand what I need to focus on next to get better. With staff, I have consistently used performance measurement as a means to show individuals and teams how they're doing, what that performance means for the client/organization and to establish goals for improvement. This, if implemented and communicated properly, can be empowering, uplifting and exciting.

### Performance Development:

### Section Three: Leadership Competency

My desire for 14-15 was to take our performance measurement activities to the next level. I failed to achieve that objective. I have recommended to the new Manager, Service Management & Operations that this be a focused effort in 15-16. That he bring someone in to work with each manager on performance measurement and to ingrain the use of this data in day-to-day decision making.

#### **Visioning and Strategic Thinking**

Developing and inspiring commitment to a vision of success; supporting, promoting and ensuring alignment with organizations.

##### **Comments:**

I pride myself on my ability to 'see the future' and to ensure all work is aligned with and contributing to the attainment of long-term, strategic goals. When you look at my operational goals for 14-15, they are remarkably broad and varied. I was asked to remove the final obstacles to begin exploiting our underutilized ERP, I was asked to lead an \$18M public safety communications system replacement project with key clients who didn't want our help (initially), I was asked to cultivate relationships with external entities and the vendor community around the introduction of a new, innovative service for Halifax, I was asked to continue leading best practice implementations within ICT so our support of current and new technologies improves and is sustainable, I was asked to lead the implementation of new platforms for the future (SharePoint) and to implement new broad spectrum capabilities to improve collaboration and productivity across the municipality (MS Lync). All of these things happened in the here and now but are supportive of a better future for the municipality.

##### **Performance Development:**

An opportunity for improvement in this area would be a renewed focus on quality and sustainability. With the pressures placed on me in 14-15, time was at a premium and pragmatism a reality. In some cases, outcomes could have been more impactful if more time was allocated to the pursuit of quality.

#### **Managing Change**

Managing and facilitating the process of change and transition while helping others deal with their effects.

##### **Comments:**

Change and ICT are becoming synonymous. 14-15 saw continued transformational change – in our leadership team, in how we are organized, in how we deliver services, in the services we deliver. As a visible leader in the organization it is my intention to continue to stay positive and show resolve as we continue to move forward together.

##### **Performance Development:**

Through this tumultuous period, more emphasis needs to be placed on establishing areas of focus and creating an environment that is sustainable over the long haul. Short term success for long-term failure is not success.

#### **Developing Others**

Involves a genuine intent to foster the long-term learning or development of others with an appropriate level of needs analysis. Its focus is on the developmental intent and effect rather than on a formal role of training. It requires a genuine intent to develop others with some thought or effort and does not include routinely sending people to formal training programs.

##### **Comments:**

To be successful at developing staff, four things are necessary: 1) You actually have to care about the employee. You can't fake this. 2) You need to be willing to be honest with them, no sugar coating. 3) You need to spend time with them, regularly. Where no topic is off limits and 4) You need to be willing to take action and work with the employee to get stronger.

In my role as an M4 manager, I need to ensure I have the proper management team in place to ensure the successful development of my team. They need to be the right people first and then secondly, I need to give them consistent direction and tools to bring our staff along.

##### **Performance Development:**

In the coming year, the biggest impact I can have in this area is by continuing to bring ICT's managers along to be better coaches and mentors for their respective teams. I come from a culture where there is a saying "There are no bad employees, only bad managers". It is critical that ICT have the right leaders and managers in place, working with staff using consistent practices if we hope to achieve our vision.

My accomplishments in this regard are defined by the addition of Alain T., the subtraction of %firstname% %lastname% and the continued mentoring and support provided to Phillip E. and Jo M.

### Section Three: Leadership Competency

#### Valuing Diversity

Valuing diversity is the ability to understand and respect the practices, customs and values of other individuals and cultures. Diversity is beneficial to the organization and community. It applies the ability to work effectively with a wide cross-section of the community representing diverse backgrounds, cultures and socio-economic circumstances, and divergent goals.

#### Comments:

Having spent my entire career in the public service, I have been raised in a management culture that appreciates and fosters diversity to the benefit of the workforce and ultimately the citizens we serve. The removal of %firstname% %lastname% presented an opportunity to bring better balance and diversity to the Service Management & Operations management team. The top candidate in a recently held competition should allow me to achieve that improved balance and more diverse team.

#### Performance Development:

In the coming year, I will continue to recruit the best person for the job and anticipate that my team(s) will continue to become more diverse over time.

### Section Four: Management Control Framework

#### Systems and processes in place to support management control of assets.

#### Accountabilities:

Information Technology Infrastructure Library (ITIL) processes

#### Results and Key Recommendations:

In Fiscal 2011-2012, I led the implementation of ICT's first ITIL best practices processes, Incident Management and Request Fulfillment. These processes continue to operate at a relatively low level of maturity.

In Fiscal 2012-2013, I led the implementation of Service Catalogue Management and Service Level Management processes. In addition, to improve upon Incident Management and Request Fulfillment, a series of workshops were run with staff and management to identify improvement opportunities in advance of implementing ICT's new IT Service Management System.

In Fiscal 2013-2014, I led the implementation of a new ITSM System (and a retrofit to the previously implemented processes) that will enable our work processes to be more efficient than ever before. It will also provide us with more consistent, quality management data and information to make better decisions as we move forward.

In Fiscal 2014-2015, I led the implementation of a new Change Management process in ICT that provides the necessary amount of process rigour relative to the business risk and impact associated with the proposed change. 2014-2015 also saw me lead the first phase of a Knowledge Management process implementation that when finalized will reduce 'search waste', improve the consistency of service delivery and reduce risk associated with knowledge leaving the organization.

#### Programs adhere to applicable legislation, policies and procedures.

#### Accountabilities:

Procurement policy

Application Management – Privacy legislation / policies

#### Results and Key Recommendations:

In my position, I regularly work with Procurement on a variety of fronts in support of projects (Tenders, RFPs) and operations (purchasing card, requisitions/purchase orders). Our working relationship has continued to improve and we will work with them to continually improve our procurement processes to create efficiencies within ICT and to yield higher quality outcomes from a procurement perspective (i.e. buying the right product or service that constitutes value for money for HRM).

Application Management – The Business Applications and Enterprise Applications sections manage corporate applications through their respective lifecycles. While performing technical support or implementing upgrades, staff in

these sections may be required to authorize access to vendors that operate outside of Canada. In these cases, due diligence must be exercised regarding the privacy implications. These accesses must be reported to HRM's Access & Privacy Officer.

**Auditing procedures established to ensure compliance and limit risk exposure.**

**Accountabilities:**

**Application Access Auditing** – Bi-annually, an access audit is performed against all Policing systems and the results disclosed with HRP management. Given the sensitivities associated with much of the data stored in these systems, it gives HRP confidence that access is being managed in line with their security requirements.

**Results and Key Recommendations:**

This audit was performed twice in Fiscal 2014-2015 and anticipate this continuing into 2015-2016. In addition, I asked the Manager, Technology Infrastructure to play a more prominent leadership role in the area of security and to meet monthly with the Manager of the Strategic Integration Unit within Halifax Regional Police on matters pertaining to Information Security.

## Section 5: Succession Summary

<b>Last 3 positions held + date</b>	Manager, ICT Transformation (February, 2015 – Present)
	Manager, Service Management & Operations (October, 2013 – February, 2015)
	Manager, Planning & CRM (August, 2012 – September, 2013)

### **Education - Level and Institution:**

College Diploma in Network Administration / Computer Training Institute

### **Professional Designation (s) Expiration date(s):**

- ITIL Expert Designation
- Help Desk Institute (HDI) "Support Center Director" certification

### **Potential Next Position and Expected Timing:**

Chief Information Officer, timing to be aligned with retirement of incumbent CIO.

### **Retention Risk – Reason and Timing e.g. outside opportunity:**

Relatively low risk of departure. Recent interest in me by multiple private sector organizations. As someone who has spent his entire career in the Public Sector, I am curious about what my professional life might look like 'on the other side'.

I am excited about the potential associated with my new position and do have a long-term career plan that sees me staying with the municipality for the next several years. I am not actively seeking employment elsewhere.

## Section 6: Employee Comments and Commitment

I feel like every year in this space I comment on how more difficult this year was than the last. The same held true for 14-15. I found myself having the least worklife balance this year than any period since 2006-2008 with the Ontario Government (but then I didn't have kids!). I was significantly over-extended for the majority of the year. Despite this, I tried to remain a positive, excited leader and manager and deliver on the work in my plan to the best of my ability and that of my team.

I was disappointed by the significant delays in the approval of the recruitment for the Manager, Computing & Telecommunications Services. 4 months just to approve the position changes and recruitment. Over 7 months of double duty despite the fact that I did the right thing – removed an ineffective leader and manager from the organization. These critical corporate processes need to improve if the municipality is going to have sustained success going forward.

I am looking forward to the new challenges that await in 15-16. I take great pride in the recent promotion of Alain T. to the position of Manager, Service Management & Operations. I will take equal pleasure from both my and his accomplishments as we move forward.

Thank you.

## Section 7: Supervisor's Comments

Performance feedback provided verbally by supervisor, HRM's Chief Information Officer.

Performance Rating Scale		
Performance Rank	Performance Rating	Definition
5	5.0	Exceptional performance, rarely achieved. Achieves results well beyond the scope of the position. Demonstrates the highest standards of performance relative to peers.
4	4.5 – 4.9	Consistently exceeds all position requirements and expectations. Accomplishments are highly valued and are often beyond the scope of the position. Demonstrates higher standards of performance relative to peers.
	4.0 – 4.4	Consistently exceeds most position requirements and expectations. Accomplishments are often noteworthy. Overall performance is consistently above the quality and quantity of peers.
3	3.5 – 3.9	Exceeds some position requirements and expectations. Successfully accomplishes all objectives. Overall performance consistently matches the quality and quantity of peers.
	2.6 – 3.4	Meets position requirements and expectations. Accomplishes most or all objectives. Some aspects of overall performance may require additional development or improvement to match the quality and quantity of peers.
2	1.6 - 2.5	Falls below some performance standards and expectations of the job. Demonstrates one or more performance deficiencies that hinder acceptable performance. Some aspects of overall performance will require additional development or improvement to match the quality and quantity of peers.
1	1.0 to 1.5	Does not meet minimum requirements in critical aspects of the job and has numerous performance deficiencies that prevent success at HRM.

Signatures	
Employee Signature	Date
Supervisor Signature	Date
CAO's Signature	Date

Overall Rating:
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