

CM-10-20 Appendix A: Corporate Project Status Reports

Reporting for the period January – April 2020

Enterprise Resource Planning (ERP)

Enterprise Asset Management System (EAMS)

Customer Relationship Management (CRM)

Business Intelligence Program (BI)

Program Status Report – Enterprise Resource Planning (ERP) Program

Reporting Period: Jan-Apr 2020
Reported By: Tracie Legg, Sr Program Mgr

Project Summary and Strategic Alignment

- Business transformation initiative focused on people, processes, technology, data, and information required to deliver human resources, payroll, financials, and budgeting functions.
- Aligned to Vision to Focus (Focus Area 5) and the corporate IT Strategy

Key achievements in last reporting period

- Completed Stage 3 of software RFP process
- Shortlisted Proponents and prepared agenda and scripts for Stage 4 detailed demonstrations
- Steering Committee approval of risk management plan process
- Completed recruitment for 2 Interns who will assist in user experience mapping, process portfolio, and communication plan (June 1 start date)

Key actions planned for upcoming period

- Stage 4 detailed demonstrations, which will result in the selection of Negotiations Proponent(s)
- Negotiations with software Proponent(s)
- Recruitment of Data/Information and Project Manager positions
- Program planning: Risk management plan, draft change management plan, communications plan, draft Implementation Services RFP

Critical Risks and Issues

- Staff capacity: Heavy reliance on staff in HR, Finance, and ITS who are also managing daily operations.
- Timelines: Detailed demonstration results may impact process and time allotted for Negotiations (e.g., One Proponent vs. multiple Proponents). This may also impact existing applications that are nearing end-of-life.

Stakeholder Engagement & Communication

- 60-70 staff across all departments will attend and provide feedback on detailed demonstrations and may be involved in user experience and business process mapping
- Communication plan will identify future activities

Overall Status:

Y

Status change:

Timelines extended to accommodate additional Proponents moving to Stage 4 and impact of COVID on key staff involved in the Program.

Project Timeline (Milestones)	Target date	Expected completion	Status
Software RFP contract awarded	09/2020	12/2020	Yellow
Implementation services contract awarded	12/2020	03/2021	Yellow
Implementation commences	01/2021	04/2021	Yellow
Go-live	01/2022	01/2022	Yellow
Transition to operations	04/2022	04/2022	Yellow

Budget Update

G

- Total Program budget: \$9,480,000
 - Actual spent to 04/2020: \$403,885
 - Commitments over and above Actuals: \$49,500

Scope Update

G

- No change in scope

Resource Update

G

- In the process of recruiting for Data/Information position and Project Manager
- Goal is to have all dedicated staff hired within 3 months of "Implementation commences" timeline.

Legend: R = At Risk Y = Warning G = On Track

Program Status Report – Enterprise Resource Planning (ERP) Program

Reporting Period: Jan-Apr 2020
Reported By: Sr Program Manager

Legend

	Green	Yellow	Red
Timeline	The project is tracking to delivery date.	The project is 3 months behind schedule	The project is 12 months behind schedule.
Budget	The project is tracking on budget.	The project is tracking to +/- 10% of approved budget.	The project is tracking to +/- 25% of approved budget
Scope	On Track	Warning	At Risk
Resource	The project is fully resourced.	The project is under resourced by 1 FTE.	The project is under resourced by 5 FTE.
Overall Status	On Track	The instant that a yellow state above is present, the project becomes yellow	The instant that a red state above is present, the project becomes red.

Project Status - Additional Notes

No additional information to report.

Project Status Report – Enterprise Asset Management Solution (EAMS) Project

Reporting Period: Jan-Apr 2020

Reported By: Andrea Smith, Project Manager

Project Summary and Strategic Alignment

- Implementation of a new enterprise-wide software solution, based on future-ready businesses processes related to Burlington's linear, fleet and equipment, and facility assets, to power the City's delivery of asset maintenance and capital planning.
- Aligned to: Burlington Strategic Plan (4.1); Vision to Focus (Focus Area 5); Corporate IT Strategy (5); Corporate Policy Strategic Asset Management

Key achievements in last reporting period

- Established EAMS Negotiation Team and commenced negotiations with Proponent, involving legal review of agreements and statements of work
- Planned the role and responsibility of EAMS Core Team members
- Completed Data Quality Assessment procurement and launched project
- Revised EAMS project governance structure

Key actions planned for upcoming period

- Award contract to Proponent
- Recruit 3 EAMS Core Team member positions
- Develop detailed project plan
- Complete Data Quality Assessment

Critical Risks and Issues

- Staff capacity: unavailable staff resources as a result of competing priorities and/or staff identified as essential workers
- Potential issues arising out of current EAMS negotiation process

Stakeholder Engagement & Communication

- Enterprise Software Steering Committee: informed of project status; endorsed revision to governance structure and team roles
- EAMS Advisory Committee: Engaged in review of relevant portions of the contract
- Key Stakeholders: Significantly engaged in Data Quality Assessment workshops

Overall Status:

Y

Status change: Timelines extended to accommodate additional work required to conclude negotiations and finalize agreements and impact of COVID on key staff involved in the Project.

Project Timeline (Milestones)	Target date	Expected completion	Status
Software and implementation services contract awarded	05/20	08/20	Y
Data Quality Assessment Complete	07/20	07/20	G
Project Plan	09/20	09/20	G
Timesheets/Payroll Feed Complete	11/20	11/20	G

Budget Update

- Total Project budget: \$2,721,300. Funds remaining: \$2,675,100

G

G

Scope Update

G

- No change in scope

Resource Update

Y

- New job description developed for Business Specialist – Asset Planning and Business Specialist – Asset Maintenance.
- Change Management position on hold pending completion of PROSCI consulting engagement and recommendations to Burlington.

Legend: R = At Risk

Y = Warning

G = On Track

Program Status Report – Enterprise Asset Management Project (EAMS) Project

Reporting Period: Jan-Apr 2020
Reported By: Andrea Smith, Project Manager

Legend			
	Green	Yellow	Red
Timeline	The project is tracking to delivery date.	The project is 3 months behind schedule	The project is 12 months behind schedule.
Budget	The project is tracking on budget.	The project is tracking to +/- 10% of approved budget.	The project is tracking to +/- 25% of approved budget
Scope	On Track	Warning	At Risk
Resource	The project is fully resourced.	The project is under resourced by 1 FTE.	The project is under resourced by 5 FTE.
Overall Status	On Track	The instant that a yellow state above is present, the project becomes yellow	The instant that a red state above is present, the project becomes red.

Project Status - Additional Notes

No additional information to report.

Project Status Report – CRM

Reporting Period: Jan-Apr 2020
Reported By: Fabi Karimullah, Project Manager

Project Summary and Strategic Alignment

Implementation of a Customer Relationship Management (CRM) system and Knowledge Base is a key initiative to achieving top priorities and goals within the V2F Strategic Plan, *Focus Area 5 - Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation.*

Key achievements in last reporting period

- Current state business process reviews for in-scope Departments
- Delivery of external consulting report from AtFocus Inc. to assess options for strategic refocusing of CRM project following strategic pause
- Update of Project Charter to support AtFocus report recommendations
- New governance model
- Addressed 2 Project Audit items

Key actions planned for upcoming period

- Vendor migration of system to Azure Cloud Services
- Department engagement to build CRM project plan, start Phase 1 rollout
- Change Management Plan, Risk Management Plan
- Remaining Audit requirements completed
- Sandbox build for CRM web upgrade testing

Critical Risks and Issues

1. COVID-19 - Risk to staff/teams' availability, engagement, customer service
2. BUDGET - Additional project funding required for full deployment
3. STAFFING FRAMEWORK – Planning for additional staff required to support Service Burlington deployment (Phase 2)

Stakeholder Engagement & Communication

- Communication to COB staff regarding “Transitional” deployment model
- Engagement with 5 departments to plan and deliver Phase 1 rollout
- Continued engagement & training of “operationalized” departments

Overall Status:

R

Status change:

At Risk since strategic pause November 2019. Review of scope and budget required for full COB rollout and long term Customer Experience goals.

Project Timeline (Milestones)	Target date	Expected completion	Status
Project Management Plan	07/2020	07/2020	Green
Phase 1 CRM within Departments	02/2021	02/2021	Yellow
Phase 2A CRM Service Burlington	12/2021	12/2021	Yellow
Phase 2B CRM for Rec Services TBD	mm/yyyy	mm/yyyy	Red
One City Phone # TBD	mm/yyyy	mm/yyyy	Yellow

Budget Update

R

- \$2,011,075 Budget approved will account for Project Team and limited deployment to 4 departments. \$910,000 expended to Dec/19.
- Limited budget for system integrations, licensing, remaining departments, operations

Scope Update

R

- Limited scope will impact efficacy of solution including integrations, reporting
- Current scope is for 4 departments only
- Web upgrades and online forms require corporate direction

Resource Update

Y

- Project Team staffed, Operations team will require growth
- Department staff required for planning and deployment activities

Legend: R = At Risk

Y = Warning

G = On Track

Project Status Report – CRM

Reporting Period: Jan-Apr 2020
Reported By: Fabi Karimullah, Project Manager

Legend			
	Green	Yellow	Red
Timeline	The project is tracking to delivery date.	The project is 3 months behind schedule	The project is 12 months behind schedule.
Budget	The project is tracking on budget.	The project is tracking to +/- 10% of approved budget.	The project is tracking to +/- 25% of approved budget
Scope	On Track	Warning	At Risk
Resource	The project is fully resourced.	The project is under resourced by 1 FTE.	The project is under resourced by 5 FTE.
Overall Status	On Track	The instant that a yellow state above is present, the project becomes yellow	The instant that a red state above is present, the project becomes red.

Project Status - Additional Notes

The scope of the initial CRM Project Charter included deployment to a limited number of departments and excluded delivery within a broader Customer Experience Strategy. In November 2019 the Customer Experience Program was established to address and achieve a corporate strategic focus. In April 2020, the Customer Experience Steering Committee approved a new direction for the CRM Project. This new direction is based on a consulting report (from AtFocus Inc.) recommending a “Transitional Deployment Model” to address risks that were impacting continued rollout. The recommended deployment model involves an interim “lite” rollout of CRM in selected departments as Phase 1; a full rollout of CRM to a consolidated Service Burlington contact center model to manage departments’ customer requests in Phase 2; and, establishing one phone number for customers to call Service Burlington.

The Customer Experience Steering Committee also endorsed the need for a corporate customer service staffing framework to plan for the customer service changes within departments and Service Burlington.

To date the City has developed a centralized customer service center and deployed CRM within Service Burlington, Clerks and Transportation departments.

Program Status Report – Business Intelligence (BI) Program

Reporting Period: Jan-Apr 2020
Reported By: Clare Cameron,
Program Manager Business Intelligence

Project Summary and Strategic Alignment

- Business Intelligence is a combination of skills, technology and strategy that transforms data into high quality information for use in great decision-making. Data is typically presented through dashboard tools.
- Aligned to Vision to Focus (Focus Area 5) and the Corporate IT Strategy, “Managing Information as an Asset”

Key achievements in last reporting period

- Developed & presented Vision to Focus integrated reporting tool to BLT
- Developed data-driven dashboard to support IT re: COVID-19 related impacts – working from home, remote access, collaboration, security
- Initial testing and feedback for Capital Budget reporting
- First round of corporate training complete, 8 courses and 27 individuals
- Master Data Management Roadmap launched

Key actions planned for upcoming period

- Participating in Community Risk and Vulnerability Branch, Situational Awareness Division to support the ECG with data-driven dashboards
- Business Objects functional replacement
- Business view development for CRM and Customer Experience
- Capital Budget and HR Recruitment reporting tools

Critical Risks and Issues

- Unavailable Staff Resources from stakeholder services, due to multiple priorities impacting staff capacity
- Poor Source Data Quality or absent data, from ineffective business processes or low level of understanding within the organization for how to best structure data, establish and implement data quality rules.

Stakeholder Engagement & Communication

- 32 people attended Phase 2 Close and Launch event
- BLT presentations and discussions Feb 12 and April 15
- One on one meetings with Councillors through February and March

Overall Status:

G

Status change:

Changed from Yellow to Green following initiation of the Master Data Management Roadmap and progress in this area.

Project Timeline (Milestones)	Target date	Expected completion	Status
Phase 3 Launch	01/20	01/20	Green
Corporate Training Launch	01/20	10/20	Green
V2F Integrated Reporting to Cttee	05/20	05/20	Green
Data-Driven Dashboard to ECG	05/20	05/20	Green
Business Objects Replacement	09/20	09/20	Green

Budget Update

G

- Total Program budget: \$2,856,256
- As of March 31 2020, the program is projecting a year-end balance of \$90,832 remaining in Capital Order CA0057.

Scope Update

G

- In response to COVID-19 impacts, creation of a new dashboard to support IT Services and development of a dashboard to support the Emergency Control Group were added to scope, and accommodated with existing staff resources on the BI program team

Resource Update

G

- Data Integration Specialist contract extended from original end date of May 2020 to new end date at program close in December 2020
- Business Analyst partial allocation to assist the BI program has been a great benefit

Legend: R = At Risk Y = Warning G = On Track

Program Status Report – Business Intelligence Program

Reporting Period: Jan-Apr 2020
Reported By: Clare Cameron,
Program Manager Business Intelligence

Legend

	Green	Yellow	Red
Timeline	The project is tracking to delivery date.	The project is 3 months behind schedule	The project is 12 months behind schedule.
Budget	The project is tracking on budget.	The project is tracking to +/- 10% of approved budget.	The project is tracking to +/- 25% of approved budget
Scope	On Track	Warning	At Risk
Resource	The project is fully resourced.	The project is under resourced by 1 FTE.	The project is under resourced by 5 FTE.
Overall Status	On Track	The instant that a yellow state above is present, the project becomes yellow	The instant that a red state above is present, the project becomes red.

Project Status - Additional Notes

No additional information to report.