



SUBJECT: Corporate project status updates

TO: Corporate Services, Strategy, Risk & Accountability Cttee.

FROM: City Manager's Office

Report Number: CM-30-20

Wards Affected: all

File Numbers: 155-03-01

Date to Committee: October 8, 2020

Date to Council: October 19, 2020

Recommendation:

Receive and file city manager's office report CM-30-20 providing status reports for designated corporate projects detailed in Appendix A and an overview of change management as provided in Appendix B.

PURPOSE:

Vision to Focus Alignment:

- Building more citizen engagement, community health and culture
 - Deliver customer centric services with a focus on efficiency and technology transformation
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Background and Discussion:

The City of Burlington has a number of projects to advance the V2F Focus Area 5: delivering customer centric services with a focus on efficiency and technology transformation. Specifically, Enterprise Resource Planning (ERP), Enterprise Asset Management Software (EAMS), Customer Relationship Management (CRM), and Business Intelligence (BI) have a corporate designation reflecting the breadth and depth of the scope of these projects and their contribution to achieving customer first approach and digital transformation.

In response to a motion of Council during the February 24, 2020 Council meeting with respect to the Enterprise Resource Planning (ERP) program report (IT-01-20), the first status reports were provided to Council through Corporate Project Governance and Status Updates (CM-10-20). This report also provided information on the theory of status reporting and the key elements of status reports in the City of Burlington including:

- Overall project status that considers scope, budget, and schedule and where clear criteria is established to objectively assess the status within each area.
- A brief description of the project and alignment to strategic goals.
- Highlights of key achievements since the last reporting period and key tasks planned for the upcoming period.
- Highlights of critical risks and challenges that form part of the risk management plan.
- Key tasks that address communications and engagement and information related to staff resourcing.
- Links to documents or tools and other information that may be relevant based on the project status.

Strategy/process

In keeping with open communication and engagement, this report provides Committee and Council with an update on each of the four corporate initiatives including overall status, key milestones, critical risks, and other relevant information with the goal of providing assurance that project governance is working effectively.

Status reports for each of the 4 corporate projects are attached in Appendix A of this report.

In addition, this report provides an opportunity to explore change management and its role in project management as attached in Appendix B. In summary, change management is the structured approach and set of tools for leading the people side of change to achieve a desired outcome. Applying change management approaches and tools can directly impact the people goals of: speed of adoption, increasing proficiency and ultimate utilization.

Change management practitioners work towards the people side of system, process and organizational changes by using tools such as: readiness and change risk assessments, stakeholder engagement and alignment of training. The role of the Change management practitioner is also as a coach and support to executives and managers in helping employees through the transition from the current state to the future state. Change management is a strategic capability to increase the organizational change capacity and to accelerate changes ultimately across the entire organization. The change management approaches, tools and methodologies are

flexible and can be applied to a variety of change initiatives from everyday operational process and people change, specific projects to major organizational shifts.

Financial Matters:

Each of the corporate projects has allocated funding sources within previously approved capital or operating budgets.

Other Resource Impacts

City staff outside of the corporate project teams are involved in the project planning and implementation (e.g. subject matter experts) for functional and technical requirements gathering, RFP assessment and evaluation, and solution implementation (including any necessary process changes).

Climate Implications

Not applicable

Engagement Matters:

During project development and implementation, city staff and key stakeholders are consulted for their input in process design and operations.

Corporate projects engage through their respective steering committees with information flowing to Burlington Leadership Team.

Status reporting will be provided to Committee and Council on a quarterly basis and as required.

Conclusion:

This report provides status reporting for corporate projects (i.e. Enterprise Resource Planning (ERP), Enterprise Asset Management System (EAMS), Customer Relationship Management (CRM), and Business Intelligence (BI)). Reporting on project status will be provided on a quarterly basis with the next update to committee planned for early in 2021.

Respectfully submitted,

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Appendices:

- A. CM-30-20 Appendix A: Project Status reports – Enterprise Resource Planning (ERP), Enterprise Asset Management System (EAMS), Customer Relationship Management (CRM), Business Intelligence (BI)
- B. CM-30-20 Appendix B: Change Management Overview presentation

Report Approval:

All reports are reviewed and/or approved by Department Director, the Chief Financial Officer and the Executive Director of Legal Services & Corporation Counsel.