

CM-30-20 Appendix A: Corporate Project Status Reports

Reporting for the period May – August 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: May-Aug 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 since last reporting period

- Completed software vendor detailed demonstrations
- Selected a Negotiations Proponent
- Commenced Negotiations
- Developed draft performance measurement framework for program benefits

Key actions planned for upcoming period

- Signed contract with software Proponent
- Systems Integrator RFP issued and closed – commence evaluation
- Finalize program charter
- Dedicated program team recruited
- Program planning: Risk management plan, draft change management plan, communications plan

Critical Risks and Issues

- Staff capacity: Heavy reliance on staff in HR, Finance, and ITS who are also managing daily operations.
- Timelines: Negotiations may impact process and timelines. It also extends our effort in maintaining and updating outdated applications.

Stakeholder Engagement & Communication

- 60-70 staff across all departments attended and provided feedback on detailed demonstrations.
- Evaluation team heavily involved in selecting a Negotiations Proponent
- Communication plan will identify future activities

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

Overall Status: Y

Status change:
Timelines for go-live and transition to operations have been extended based on preliminary discussions with Negotiations Proponent.

Project Timeline (Milestones)	Target date	Expected completion	Status ● Y
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 (core functionality)	01/2022	06/2022	Yellow
Transition to operations	04/2022	11/2022	Yellow

Budget Update ● G

- Total Program budget: \$9,480,000
 - Actual spent to 08/2020: \$1,115,341
 - Commitments over and above Actuals: \$59,000

Scope Update ● G

- No change in scope

Resource Update ● G

- Starting process to recruit for Project Manager, Change Management Lead, Data/Information position, and appoint staff to other key positions.
- Goal is to have all dedicated staff hired for “Implementation commences” timeline.

Program Status Report – Enterprise Resource Planning (ERP) Program

Reporting Period: May-Aug 2020
Reported By: Tracie Legg, Sr Program Mgr

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

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

Reporting Period: May-Aug 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

- Advanced EAMS negotiations with Proponent
- Initiated and completed Data Quality Assessment project
- On-boarded EAMS Business Specialist
- Initiated timesheets/payroll feed project to EmpCentre
- Prepared Capital Budget business case for project funding augmentation

Key actions planned for upcoming period

- Award contract to Proponent
- Recruit 3 EAMS Team member positions
- Develop detailed project plan
- Complete timesheet/payroll feed project

Critical Risks and Issues

- Staff capacity: unavailable staff resources as a result of competing priorities and/or impact of COVID-19
- Potential issues arising out of current EAMS negotiation process

Stakeholder Engagement & Communication

- Enterprise Software Steering Committee: informed of project and negotiation status; budget impacts; endorsed project identity
- EAMS Advisory Committee: draft project benefits; contract negotiation update; licencing and device requirements
- 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.

Project Timeline (Milestones)	Target date	Expected completion	Status
Software and implementation services contract awarded	05/20	11/20	Y
Data Quality Assessment Complete	07/20	07/20	G
Project Plan	09/20	011/20	Y
Timesheets/Payroll Feed Complete	11/20	12/20	Y

Budget Update

• Total Capital Budget Expenditures: \$2,721,300. Funds remaining: \$2,590,321 G

Scope Update

• No change in scope G

Resource Update

- Project funding augmentation request has been submitted as part of the 2020 Capital Budget for 2021-2031 Budget Y
- Project implementation schedule changed from 24 mos to 42 mos; project team extensions will be required.
- 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: May-Aug 2020
Reported By: Andrea Smith, Project Manager

Legend

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Project Status - Additional Notes

- No additional information

Project Status Report – CRM

Reporting Period: May-Aug 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

- Enabled Service Burlington work-from-home deployment in May
- Requirements and configuration for Phase 1 CRM for RPF & Transit
- Change Management Plan, Risk Management Plan completed
- Preliminary Business Intelligence (BI) requirements analysis
- Vendor migration to Azure Cloud Services (improve security compliance)
- All Project audit items addressed; 1 Operation audit item to be reviewed

Key actions planned for upcoming period

- Phase 1 (CRM “lite”) deployment of CRM in RPF (October) & support
- Phase 1 (CRM “lite”) deployment of CRM in Transit (October) & support
- Deployment planning for Community Planning & Building/By-law depts
- Preliminary BI development
- Data & privacy review on CRM use for city vs. constituent records
- Web upgrade

Critical Risks and Issues

1. COVID-19 - Risk to staff/teams’ availability, engagement, customer service
2. BUDGET & STAFFING FRAMEWORK- Additional funding & staff required for full deployment
3. Compliance with MFIPPA in Councilors' Office use of CRM

Stakeholder Engagement & Communication

- Regular engagement/consultation with CX Steering Committee, Working Group, Service Burlington operations
- Engagement with Transit, RFP to deliver Phase 1 rollout in October

Overall Status:

R

Status change:

Additional budget required to support Project; scope and timelines dependent on budget approval; COVID-19 changes impacting project.

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	Yellow
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.
- Additional budget requested in 2021 for delayed implementation, BI, system integrations, licensing, operations, additional department

Scope Update

Y

- Budget request in 2021 to support expanded scope per above
- Current scope addresses 4 departments only, 1 integration
- Web upgrades and online forms require corporate direction
- Work from home may impact deployment activities

Resource Update

Y

- Project Team staffed, Operations team will require growth
- Department staff required for planning and deployment activities but may have competing priorities and complexity due to COVID-19

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

Project Status Report – CRM

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

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Project Status - Additional Notes

Program Status Report – Business Intelligence

Reporting Period: May-Aug 2020

Reported By: Clare Cameron

Project Summary and Strategic Alignment

- Business Intelligence transforms data in to 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

- Second round of corporate training complete, including mentorship
- Successful upgrade to latest version of WebFOCUS (8207)
- Internal launch of Vision to Focus Integrated Reporting application
- Completed consultations for Master Data Management roadmap
- Initiated business view creation to assist CRM reporting

Key actions planned for upcoming period

- Replacement of critical corporate reporting functionality currently provided by Business Objects (MyReports) including payroll verification
- Capital Order Status Reporting
- Analytics development for additional areas including traffic monitoring, fleet fuel efficiency, transit revenue, parking spot utilization
- Omni-Gen utilization and skills development for data quality analysis

Critical Risks and Issues

- All dedicated contract resources are set to terminate at end Dec 2020
- Unlikely that all required development and transition to operations tasks will be complete by December 2020, due to COVID-19 additional scope

Stakeholder Engagement & Communication

- Business Intelligence Power User Round Table community meetings
- Mentorship program established for knowledge and skills development
- Video tours of all current dashboards added to 360

Overall Status: Y

Status change:
Change from green to yellow given delay due to COVID-19, and lack of approved long-term sustainability model for 2021.

Project Timeline (Milestones)	Target date	Expected completion	Status Y
Internal launch of V2F Reporting	8/20	8/20	Complete
Upgrade to WebFOCUS 8207	8/20	8/20	Complete
Final cycle of corporate BI training	10/20	10/20	On Track
Phase 3 Complete	9/20	12/20	Warning
Transition to Operations	12/20	3/21	Warning

Budget Update G

- Total Program Budget: \$2,856,256
- Program is anticipated to close within approved budget

Scope Update G

- Scope remains ambitious
- In addition to new areas of analytics development, the team must provide technical support and resolution for existing BI applications

Resource Update Y

- All dedicated contract resources are set to terminate at end Dec 2020
- Contracts will terminate before decisions for 2021 Operating Budget
- Preliminary business case for FTE team will be submitted October 5

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



Project Status Report – Business Intelligence

Reporting Period: May-Aug 2020

Reported By: Clare Cameron

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