Program Status Report – Business Intelligence

Appendix A of Report CM-05-21

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

- Launch of Capital Order Status Reporting
- Successful connection between CRM and Integration Platform, enabling future integrations.
- Successful launch of Point of Sale integration
- Master Data Management roadmap presented to Information Governance Committee

Key actions planned for upcoming period

- Replacement of critical corporate reporting functionality currently provided by Business Objects (MyReports) including payroll verification
- Enhanced telephony reporting for CRM
- Integration between RPF's tree inventory software and CRM
- Utilization and skills development of our data quality analysis tool
- Plan for operationalizing Business Intelligence Program

Critical Risks and Issues

- All dedicated contract resources are set to terminate at end March 2021
- Unlikely that all required development and transition to operations tasks will be complete by March 2021

Stakeholder Engagement & Communication

- Ongoing mentorship program for knowledge and skills development
- Video tours of all current dashboards added to 360

Overall Status: Y

Status change:
Status remains yellow due to lack of approved long-term sustainability model for 2021.

Project Timeline (Milestones)	Target date	Expected completion	Status Y
Phase 3 Complete	9/20	3/21	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 March 2021
- Business case for FTE team has been submitted to Operational Budget

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

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Project Status Report – 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

Project Status Report – CRM

Project Summary and Strategic Alignment

Implementation of a Customer Relationship Management (CRM) system and corporate Consolidated Contact Center model is a key initiative 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

- Steering Committee approval of Change Management Plan
- Phase 1 (CRM "lite") deployment of CRM in RPF
- Phase 1 (CRM "lite") deployment of CRM in Transit
- Technical upgrades to CRM system (Mitel,O365,version upgrade)
- Development of CRM Online demos for awareness & training
- SRT approval of HR staffing framework for customer service impacts

Key actions planned for upcoming period

- RPF business analysis & configuration for CRM Phase 2
- Transit business analysis & configuration for CRM Phase 2
- Preliminary development for Business Intelligence dashboard
- Revised CRM user access model to support privacy/security
- HR staffing framework
- Technical upgrades

Critical Risks and Issues

1. COVID-19 - Risk to staff/teams' availability, engagement, customer service
2. BUDGET – Additional capital budget required for project team and tasks
3. STAFFING FRAMEWORK- Additional staff required for deployment to Service Burlington

Stakeholder Engagement & Communication

- Regular engagement/consultation with CX Steering Committee, Working Group, Service Burlington operations
- Engagement with Transit, RFP staff for design & build of Phase 2
- Corporate communications on alignment of new CX Strategy and CRM

Overall Status: R

Status change:
Pandemic and availability of resources poses greatest risks to completing current project scope.

Project Timeline (Milestones)	Target date	Expected completion	Status R
Phase 1 CRM within 2 Departments	02/2021	02/2021	Complete
HR Staffing Framework	12/2021	04/2021	Red
Phase 2A CRM – 4 Departments	12/2021	Q1/2022	Green
Phase 2B CRM - Rec Services TBD	2022	2022	Yellow
One City Phone # TBD	TBD	TBD	Yellow

Budget Update R

- $2.01M approved budget will account for Project Team and limited deployment to 4 departments. $1.43M expended to date.
- Additional budget requested in 2021 for implementation, BI, system integrations, licensing, operations, additional department

Scope Update Y

- Corporate alignment required on CRM web & corporate website
- Confirmation of scope pending 2021 budget approval

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
- Pandemic impacting efficacy of training and deployment

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

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Project Status Report – CRM

Legend

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Project Status - Additional Notes

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

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
- On-boarded second EAMS Business Specialist and application analyst
- Advanced timesheets/payroll feed project to EmpCentre
- Completed EAMS Risk Plan and development of Risk Register

Key actions planned for upcoming period

- Award contract to Proponent
- Recruit 1 EAMS Team member positions (Change Management Lead)
- 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; approval of Project Charter; approval of Risk Plan.
- EAMS Advisory Committee: contract negotiation update; draft project schedule; solution implementation scope of work; solution configuration phases; project implementation team structure
- Key Stakeholders: Engagement in timesheets/payroll feed

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	01/21	Y
Timesheets/Payroll Feed Complete	11/20	04/21	Y
Project Plan	09/20	04/21	Y

Budget Update

- Total Capital Budget Expenditures: $2,721,300. Funds remaining: $2,556,036.   G

Scope Update

- No change in scope   G

Resource Update   Y

- Project funding augmentation request has been submitted as part of the 2021-2031 Capital Budget

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

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

Reporting Period: Q4-2020
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.
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Project Status - Additional Notes

- No additional information

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Program Status Report – Enterprise Resource Planning (ERP) Program

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

- Signed agreement with Workday Limited to supply software solution for all modules (HCM/Payroll, Financials, Planning & Analytics)
- Drafted RFP for Implementation Partner
- Hired Project Manager and Systems Analyst positions

Key actions planned for upcoming period

- Issue RFP for Implementation Partner, review Proposals, shortlist and conduct interviews/presentations
- Hire and onboard 5-7 dedicated team positions
- Finalize program charter, roll out ERP Program page on 360
- Program planning: Overall project plan, risk management plan, draft change management plan, communications plan
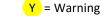
Critical Risks and Issues

- Staff capacity: Heavy reliance on staff in HR, Finance, and ITS who are also managing daily operations.
- RFP Responses: Risk of receiving responses that exceed time and budget estimates.
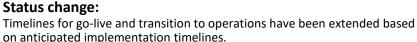
Stakeholder Engagement & Communication

- Engagement with RFP Evaluation and advisory teams (50-70) staff on results of the software RFP and input for Implementation Partner RFP
- Ongoing discussions with key stakeholders in Human Resources, Finance, and ITS on program planning and RFP development
- 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 anticipated implementation timelines.

Project Timeline (Milestones)	Target date	Expected completion	Status Y
Software RFP contract awarded	09/2020	12/2020	G
Implementation services contract awarded	12/2020	06/2022	G
Implementation commences	01/2021	07/2021	Y
Go-live (sequenced over 18 mths)	07/2022	12/2022	Y
Transition to operations	04/2022	12/2022	Y

Budget Update   G

- Total Program budget: $9,480,000
    - Actual spent to 12/2020: $789,929
    - Commitments over and above Actuals: $1,826,682

Scope Update   G

- No change in scope

Resource Update   G

- Project Manager (start Feb 2021) and Systems Analyst (start April 2021) have been recruited
- In progress: Change Management Lead, Data Lead, Finance Lead, Business Operations Specialists (5 positions)
- Goal is to have all dedicated staff in place 2-3 months before "Implementation commences" timeline.

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Program Status Report – Enterprise Resource Planning (ERP) Program

Reporting Period: Q4-2020
Reported By: Tracie Legg, Sr Program Manager

Legend

	Green	Yellow	Red
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Project Status - Additional Notes

Information report on the software procurement process will be forwarded to the March 3, 2021 Corporate Services, Strategy, Risk, and Accountability Committee meeting.

As outlined in their Proposal, "Workday brings financials, human resources, payroll, reporting, planning, and analytics together into a single cloud-based system. It gives you the tools and capabilities you need to manage, attract, develop and retain the best employees and support financial transactions, controls, and analytics. The software can be used on a desktop as well as the mobile devices you use every day. With Workday, the City can control and predict costs, increase productivity, and dramatically improve data visibility. The Workday solution is the result of innovative thinking, new technologies, and a fresh approach to capturing and prioritizing product developments to support organizations like the City of Burlington."

Focus now turns to procuring professional services to assist the City in implementing the Workday solution. While the RFP process is underway, the dedicated team will ramp up planning activities to ensure that we are prepared for the Implementation Partner when they come on board. This includes developing the project plan, change management plan, communication plan, readying our data, and reviewing policies and processes.

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