



SUBJECT: Corporate project status updates – Q4 2020

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

FROM: City Manager's Office

Report Number: CM-05-21

Wards Affected: All

File Numbers: 155-03-01

Date to Committee: March 3, 2021

Date to Council: March 23, 2021

Recommendation:

Receive and file city manager's office report CM-05-21 providing status reports for designated corporate projects (for Q4 2020) detailed in Appendix A and an overview of risk management in projects 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

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. These reports are for progress during the period September to December 2020. Of note in the Business Intelligence status update is the pending transition from a project to continuing operations. What started in 2017 as a 3-year project, Business Intelligence has created the foundation for data analytics in decision-making and dashboard reporting with a suite of software tools, defined processes and in-house skill development. Through this project, service leads and management have come to rely on the data analysis – provided through the BI platform – to support their service and business decisions. Key examples of the use of BI include the V2F Integrated Reporting, Emergency Control Group Dashboard, Transit route performance and ridership counts, parking lot utilization and parking infractions, and modal split analysis; to name a few. With this transition to operations, BI will no longer be a part of the corporate project status reports.

In addition, this report provides an opportunity to explore risk management and its role in project management as attached in Appendix B. Council recently approved the City's Risk Governance Strategy and Enterprise Risk Management Policy (CM-34-20,

December 10 CSSRA). In the context of the strategy, Enterprise Risk Management is an integral component of project management. Corporate projects all have robust risk plans prepared by their respective project managers and are presented regularly to the project steering committees. This integrated approach helps to identify, assess, monitor and report risks within projects and across projects; supporting the escalation of risks to a corporate level as needed where common risks combine and result in higher degrees of impact or larger barriers to successful project completion.

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 mid year 2021.

Respectfully submitted,

Sheila M. Jones
Executive Director,
Strategy, Risk &
Accountability

ext. 7872

Christine Swenor
Chief Information Officer

ext. 7776

Angela Morgan
Strategic Lead – Customer
Experience

ext. 7374

Appendices:

- A. CM-05-21 Appendix A: Project Status reports – Business Intelligence (BI), Customer Relationship Management (CRM), Enterprise Asset Management System (EAMS), and Enterprise Resource Planning (ERP)
- B. CM-05-21 Appendix B: Risk Management Overview presentation (distributed as an addendum)

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.