



SUBJECT: Corporate Project Status Updates – Q1/2021

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

FROM: City Manager's Office

Report Number: CM-10-21

Wards Affected: All

File Numbers: 155-03-01

Date to Committee: May 5, 2021

Date to Council: May 18, 2021

Recommendation:

Receive and file city manager's office report CM-10-21 report providing status reports for designated corporate projects for Q1 2021 as detailed in Appendix A.

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), and Customer Relationship Management (CRM) 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 the previous report (CM-05-21), management reported the transition of the Business Intelligence project to an operating state; thus concluding its project status reporting.

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 three 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 3 corporate projects are attached in Appendix A of this report. These reports are for progress during the period January to March 2021. The criteria and guidance for assessing a project's health status are currently under review. For this reporting period, the existing project health status and guidance are being used. Transition to amended criteria and guidance will be in place for the next reporting period.

Financial Matters:

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

Total Financial Impact

Not applicable.

Source of Funding

Not applicable.

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 the corporate projects; i.e. Enterprise Resource Planning (ERP), Enterprise Asset Management System (EAMS), and Customer Relationship Management (CRM). Reporting on project status will be provided in September covering the period April to July 2021.

Respectfully submitted,

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Appendices:

- A. Project Status reports – Customer Relationship Management (CRM), Enterprise Asset Management System (EAMS), and Enterprise Resource Planning (ERP)

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.