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

- RPF business analysis & configuration workshops
- Transit business analysis & configuration, user acceptance testing
- Preliminary development of Business Intelligence dashboard
- Development & testing of new CRM user security model
- GIS upgrade
- CRM new release testing
- Tested & cancelled CRM OneLink web upgrade due to limitations
- CX/CRM communications & change management (360, Roadshow, etc.)

Key actions planned for upcoming period

- CRM Launch in May – Transit, new security model, new releases
- Consultant engaged for HR staffing framework
- RPF – system & integrations design, build and test
- Stakeholder engagement – Recreation, Planning, Building & By-law

Stakeholder Engagement & Communication

- Regular engagement with CX Steering Committee, CX Working Group, Service Burlington and operationalized departments
- Process reviews, testing, training with Transit, RPF, Service Burlington

Overall Status: (R)

Status Change [outline any changes]

- 2021 Budget approved
- Significant delays in project implementation

Project Timeline (Milestones)	Target date	Expected completion	Status (R)
Deployment- Service Burlington, Clerks, Transportation	2019	2019	Complete
CRM "Lite" pilot – RPF, Transit	10/2020	10/2020	Complete
CRM Full Deployment - Transit	04/2021	05/2021	Green
CRM – RPF	06/2021	09/2021	Red
CRM - Planning, Bldg & By-law	Q1/2022	2022	Red

Budget Update (G)

- $3.11M approved budget to date; expenditures on track

Scope Update (Y)

- Scope updated to include: Enhanced KBA website search feature; New systems integration for RPF; Implementation of revised security model
- Approval of decentralized deployment model for Transit
- Scope additions anticipated

Resource Update (R)

- Service Burlington addition of contract P/T staff to accommodate planned deployments in short term
- Project team secondments supported until March 2022

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

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Critical Risks and Issues	Response Strategy
1. Staff Capacity: Operational priorities due to COVID-19 and/or other projects impact departments' ability to prioritize and complete CRM project tasks in required timeframe.	• Mitigate: Reduce scope for CRM "Lite" deployment and 2021 budget requested and approved. Delays in implementation are expected to continue; revised response strategy may impact budget.
2. Staff Resources: Delayed go-live dates due to lack of resources in Service Burlington to meet the increased customer demand when onboarded department customer contacts are transferred to Service Burlington.	• Mitigate: Engage HR consultant to develop staffing framework. This activity is significantly delayed; revised response strategy may impact budget.
3. Staff Resources and Skills: Service disruptions in operations due to lack of resources and skill set to maintain and update the system once project is complete.	• Mitigate: Develop restructuring and transition plan through Designing & Evolving the Organization
4. COVID-19 and impact of staff working from home adds complexity to rollouts, hardware deployment, training and support.	• Mitigate: Use of collaborative remote software, cost sharing, additional sessions to support revised training model

- Future scope change requests may include web integration, EAMS integration, full Recreation Community Culture implementation.

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.

Criteria Under Review

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 in reporting period

- Implementation Partner RFP issued and closed
  - First round of scoring and shortlisting complete
- Dedicated program team recruited
- Official onboarding to Workday application
- Privacy Impact assessment RFQ closed and vendor has been selected.

Key actions planned for upcoming period

- Implementation Partner selection – Interviews completed and contract awarded
- Dedicated program team onboarded
- Program planning: draft project plan and timeline; risk management plan; change management plan; communications plan; decision making framework

Stakeholder Engagement & Communication

- April 2021 – Program webpage on 360.
- 30-40 members of the advisory team invited to participate and provide feedback on the Implementation Partner RFP interviews.

Overall Status: G

Status Change [outline any changes]

- Project Timeline - Final timeline is dependent on awarding the contract to the selected Implementation Partner by June 2021.

Project Timeline (Milestones)	Target date	Expected completion	Status G
Implementation services contract awarded	12/2020	06/2021	Green
Implementation	07/2021	12/2022	Green
Phased Functionality Launch	10/2021	12/2022	Green
Transition to operations	01/2022	12/2022	Green

Budget Update G

- Total Program budget: $9,480,000
  - Actual spent to 03/2021: $1,827,170
  - Commitments over and above Actuals: $1,807,480

Scope Update G

- No change in scope.

Resource Update G

- Feb/Mar : Project manager, HR Admin Business Specialist, Payroll Business Specialist, Change Management Lead
- April/May : Systems Analyst, Finance Lead, Business Operations Specialists (3 positions), Data Management Lead

Critical Risks and Issues	Response Strategy
• Staff capacity: Heavy reliance on staff in HR, Finance, and ITS who are also managing daily operations.	• Mitigate: The recruitment and onboarding of dedicated ERP Program team members has reduced the severity of this risk. However, the program is still very dependent on engaging staff from across the organization throughout the implementation. The following actions will be taken to further manage the risk. 　○ Ensure that meetings and engagements are planned and scheduled well in advance to ensure better planning and availability of staff. 　○ Consult with supervisors and managers to work through time and availability of their team members as required.
• Timelines, Scope and Budget: Negotiations may impact timelines, scope and budget.	• Accept: We will continue to monitor this risk and adapt as needed. The Risk response may change with outcome of negotiations with the selected Implementation partner.
• Change Resistance: The amount of expected change associated with the ERP program and other initiatives within the organization on the Stakeholders could cause change resistance or change fatigue.	• Mitigate: A change management plan that is focused on better user adoption and reduction of change resistance will be developed.

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Criteria Under Review

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

- Awarded contract to Applied GeoLogics for the supply, install and implementation of Cartegraph Operating Management System (OMS) and Assetic software solutions.
- Comprehensive Project Kick-Off Meeting and Phase 1 – Core Configuration (Infrastructure Set-Up) Kick-Off Meeting.
- Advancement of timesheet/payroll feed project to remove from Avantis.
- Onboarded Change Management Lead to EAMS Core Team.

Key actions planned for upcoming period

- Completion of Phase 1 – Core Elements (Infrastructure Set-Up)
- Pre-Work Set-Up for Phase 2 –Linear Assets Implementation for Cartegraph and Assetic Software
- Start of Phase 2 – Linear Assets Implementation
- Development of EAMS Change Management Plan
- Completion of timesheet/payroll feed project

Stakeholder Engagement & Communication

- Enterprise Software Steering Committee: Project Status Report; Procurement Update; Staff Recruitment Update; EAMS Risk Governance Framework; Risk Register; CSSRA Committee Meeting Update.
- EAMS Advisory Committee: Project Status Report; Procurement Update; Revised Draft Project Schedule; Summary of Implementation 'Roll-Out'; Cartegraph/Assetic Software Demo and Kick-Off Meeting Info.
- EAMS Stakeholders: Link to EAMS Project 360 webpage; Procurement Update; Thank you message to all who supported procurement process.

Overall Status: (G)

Status Change [outline any changes]

- Status change from Y – Warning to G – On Track. This is due to the fact that the contract has now been awarded and schedule will be baselined from point of Project Kick-Off meeting held in April.

Project Timeline (Milestones)	Target date	Expected completion	Status (G)
Project Kick-Off Mtg	Mar 29/21	Mar 29/21	On Track
Phase 1 – Core System Kick Off Mtg	Apr 1/21	Apr 1/21	On Track
Phase 1 – Core System Infrastructure	Mar 29/21	May 11/21	On Track
Phase 1 – Administrative Training	May 3/21	May 20/21	On Track
Phase 2 – Linear Assets Phase	Jun 7/21	Apr 19/23	On Track

Budget Update (G)

Total Capital Budget Expenditures: $4,356,300. Funds remaining: $3,894,412.61 (89.4%).

Scope Update (G)

- No change in scope.

Resource Update (G)

- EAMS Core Team is now in full complement
- Project funding augmentation request was approved as part of 2020 Capital Budget

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

CITY OF Burlington

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

Critical Risks and Issues	Response Strategy
• Staff capacity: unavailable staff resources as a result of competing priorities and/or impact of COVID-19	• Accept: The Project Team though its communications will provide advance notice of when project activities could impact stakeholders. If required, activities can potentially be re-sequenced to adjust components within the schedule. Impact to scheduled milestones will be reported.
• Scope Creep: Project stakeholders request new requirements	• Mitigate: All potential changes to scope will be brought to Steering Committee following change control process, assessing impact to schedule and budget. Risk of implementing the change and risk of not implementing the change will also be reported.
• Low User Adoption: Project stakeholder adopt the new solution to varying degrees compromising project benefits.	• Mitigate: Development of a Change Management Strategy and execution of change management tactics following the City's adopted Enterprise Change Management model.
• Complex and Changing Integration Environment: EAMS related integrations require additional work/rework due to coordination requirements of EAMS integrations with other existing and/or emerging solutions and related upgrades.	• Mitigate: Participation in standing integration meetings led by ITS with attendance of other project managers to discuss sequencing, timing and dependencies of various integrations.

Legend

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