Program Status Report – Enterprise Resource Planning (ERP) Program

Appendix A to CM-17-21

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

- Negotiation with Implementation Partner started with first IP - Review of Statement of Work is ongoing.
- Business Process and Policies identification and review ongoing.
- Data identification and Cataloguing ongoing.
- Official onboarding to Workday application
- Completed Change Management activity of identifying and establishing stakeholder groups and connectors
- Privacy Impact assessment initiated
- Dedicated program team onboarded

Key actions planned for upcoming period

- Implementation Partner selection and approval – Interviews completed and contract awarded
- Dedicated program team onboarded
- Program planning: Risk management plan; change management plan; communications plan; decision making guidelines,
- Business Process and Policies identification and review ongoing.

Stakeholder Engagement & Communication

- ERP Program webpage on 360 for staff awareness and communication.
- Approximately 100 people were invited to participate in an awareness roadshow that will be held throughout the summer months. There is representation at the manager level and above from all 4 key pillars (EICS, CPRM, CMO, CSS) as well as union leadership from the 4 unions representing city staff.

Overall Status: Y

Status Change [outline any changes]

- Project Timeline – Final timeline is dependent on negotiations and contract award to the successful Implementation Partner. Timeline will also be rebaselined when a final Implementation partner is selected and approved.

Project Timeline (Milestones)	Target date	Expected completion	Status Y
Implementation services negotiation	05/2021	09/2021	Yellow
Implementation services contract awarded	09/2021	10/2021	Yellow
Implementation	10/2021	01/2023	Yellow
Phased Functionality Launch	06/2022	01/2023	Yellow
Transition to operations	10/2022	03/2023	Yellow

Budget Update - Final budget is dependent on the outcome of negotiation. Y

- Total Program budget: $9,480,000
  - Actual spent to 06/2021: $2,079,093
  - Commitments over and above Actuals: $1,828,086.86

Scope Update G

- No change in scope.

Resource Update G

- April/May 2021: The following project members joined the ERP Program - Systems Analyst, Finance Business Lead, Business Operations Specialists, Data Management Lead and Change Management lead.
- June 2021: Retirement – Tracie Legg (Senior Program Manager) and Christine Swenor (CIO, Sponsor and Chief Negotiator)
- June 2021: Robert Delorme (New Senior Program Manager)
- June 2021: Wendy Hough (Acting CIO, Sponsor)

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

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Critical Risks and Issues	Response Strategy
• **Dependency on output from other City projects and initiatives e.g., Job Evaluation Initiative, EAMS Project**: Several projects and initiatives are underway that may impact functionality and integrations within Workday. For example, the output of the Job Evaluation (Job titles, Positions, Grades etc.) will form the background data for the HCM SKU/Module and Payroll SKU/Module during the Workday implementation.	• Mitigate: Stay connected with other Project Managers and Sponsors to clearly identify dependencies, expected outcomes and align timelines. • Job Evaluation: the ERP Program team has continued to work with the Job Evaluation team to ensure we are aligning timelines and expectation.
• **Timely Decisions and Approvals**: The ERP program will trigger change/reviews in some processes, business rules and policies that will require decisions. The collaborative nature of the City's approach to decision-making could extend program timelines and subsequently budget.	• Mitigate: Decision making guidelines, linked to the ESSC decision makers, as defined in the ESSC Terms of Reference, will guide the decision-making process throughout the lifecycle of the ERP program. The guidelines identify all decision maker(s) and will expedite decision timelines
• **Timelines, Scope and Budget**: **Implementation Partner** 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.

	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 o /- 18% f 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.

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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

- Completion of Phase 1 - Core Elements (Infrastructure set-up)
- Completion of Phase 1 - Core System Deployment including single sign on (SSO) and GIS Integration
- Completion of Technical and Administrative training sessions
- Development of EAMS Change Management Plan
- Completion of awareness Roadshows to the impacted teams
- Phase 2 – Linear Assets Implementation Kick-off meeting

Key actions planned for upcoming period

- Pre-Work Set-Up for Phase 2 –Linear Assets Implementation for Cartegraph and Assetic Software
- Completion of timesheet/payroll feed project
- Integrations: SAP, CRM and Payroll
- Corporate Inventory Management and Transportation services stockroom setup

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]

- On Track – Contract has been awarded to AGL, and Project kicked-off.

Project Timeline (Milestones)	Target date	Expected completion	Status G
Phase 2-1-1 – Integrations and Common data	Jun 07/21	Sep 21/21	On Track
Phase 2-1-2 – Corporate Inventory Management and Transportation stockroom setup	Jul 19/21	Jan 13/22	On Track
Phase 2-1-3 – Onboard: Sign Shop	Aug 16/21	Jan 20/22	On Track
Phase 2-1-4 – Onboard: Cemeteries	Aug 16/21	Jan 25/22	On Track

Budget Update G

Total Capital Budget Expenditures: $4,356,300. Funds remaining: $3,864,823 (88.7%).

Scope Update G

- Addition of Transportation services stockroom to the scope of the project

Resource Update G

- Hiring process for a new Project Manager is underway

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

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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.
• SAP Integration: Complexity of SAP integration with Cartegraph require significantly more staff, consulting and/or time resources than estimated, impacting system configuration and design and project schedule.	• Mitigate: Engage with Region of Halton to assess SAP integration context and determine next steps required to begin SAP integration.

	Green	Yellow	Red
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Criteria Under Review

Project Status Report – Customer Relationship Management (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

- CRM successfully launched in May to Transit Department with enhanced support from Service Burlington
- Launch of updated security model and three software version upgrades
- Launch of Business Intelligence (BI) data view & dashboard
- Consultant engaged for incremental HR staffing analysis
- RPF – system & integrations design and build, process reviews, user acceptance testing, desktop installations & communications planning
- Knowledge transfer sessions between RPF & Service Burlington
- Project planning & engagement sessions with Recreation Community & Culture, Community Planning, Building & By-law staff

Key actions planned for upcoming period

- RPF & Service Burlington staff training, communications
- RPF launch of CRM including business process changes and move to Service Burlington consolidated contact center model
- Launch of Answer Plus after-hours phone service in Service Burlington
- Vendor contract changes to address CRM-Cartegraph integrations and future/delayed department rollouts
- Integrations planning & testing
- Budget and resource planning for operationalization of CRM project and team

Stakeholder Engagement & Communication

- Regular engagement with CX Steering Committee, CX Working Group, Service Burlington and operationalized departments
- Business process analysis with RPF and Service Burlington

Overall Status: **R**

Status Change [outline any changes]

- Delays in implementation of 2 departments due to COVID-19 impact on department priorities, staff availability and customer service

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	Complete
CRM – RPF	09/2021	09/2021	On Track
CRM - Planning, Bldg & By-law	Q1/2022	TBD	At Risk

Budget Update **Y**

- $3.11M approved budget to date; expenditures on track
- Budget requirements for operationalization of CRM & customer experience objectives under review

Scope Update **Y**

- Scope increased to include series of CRM-Cartegraph (EAMS) integrations over 2.5-year timeframe
- Implementation of Community Planning and Building & By-law delayed due to workload and inability to dedicate resources to implementation.
- Web enhancement/upgrade required due to obsolete CRM widget

Resource Update **R**

- Redeployment of 1 existing FTE position from RPF to Service Burlington
- Loss of project team resource (Change Management Lead)
- Successful transition to operations requires extension of Project team beyond March 2022

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

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Project Status Report – Customer Relationship Management (CRM)

Critical Risks and Issues	Response Strategy
1. Operational priorities due to COVID-19 and/or other projects impact departments' ability to prioritize and complete CRM project tasks in required timeframe.	• Mitigate: Extend timeframe for completion of scope enhancements and department rollouts through gradual operationalization of project and resources; revised response strategy will require additional budget.
2. Failure to address resource changes in Service Burlington and impacted departments will affect staff and delay project deployment .	• Mitigate: Engage HR consultant to develop staffing framework. This activity will be performed incrementally as departments are transitioned to CRM/consolidated contact center and may impact timelines.
3. Inadequate framework and resources to continue CRM activities and Customer Experience strategy when project transitioned to operations.	• Mitigate: Develop restructuring plan through Designing & Evolving Our Organization and capital/operating budget planning.
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.
5. CRM web product requires upgrade/enhancement to meet web and customer service standards	• Mitigate: Website fixes in progress and alternatives for upgrade, enhancement or replacement to be assessed for future implementation.

Project Status - Additional Notes

• None

Legend

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Criteria Under Review

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