



**SUBJECT:** Corporate project status reports – Aug to Oct  
**TO:** Corporate Services, Strategy, Risk & Accountability Cttee.  
**FROM:** City Manager's Office

Report Number: CM-23-21

Wards Affected: All

File Numbers: 155-03-01

Date to Committee: December 6, 2021

Date to Council: December 14, 2021

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### **Recommendation:**

Receive and file city manager's office report CM-23-21 providing status reports for designated corporate projects for the period August through October 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

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### **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 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 August to October 2021. While the criteria and guidance for assessing a project's health status have recently been amended within the context of overall project management practices with Information Technology Services, we are deferring its use until 2023. This deferral will provide us with an opportunity to take a refreshed look at the report template to enhance the information reported to council. In addition, we are reviewing our inventory of corporate-wide projects to appropriate status reporting is provided to Council.

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### **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).

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**Climate Implications**

Not applicable

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**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.

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**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 February 2022 covering the period November and December 2021.

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Respectfully submitted,

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**Appendices:**

- A. CM-23-21 Appendix A: Corporate Project Status reports – Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and Enterprise Asset Management System (EAMS)

**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.