

Corporate Project Status Reports

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August to October

CM-23-21

Appendix A

Program Status Report – Enterprise Resource Planning (ERP) Program

Reporting Period: Aug - Oct 2021
Reported By: Ade Ogunkoya, Project Mgr.

Project Summary and Strategic Alignment	Overall Status: <div>R</div>																										
<ul style="list-style-type: none">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	Status Change [outline any changes]																										
Key achievements in reporting period	<ul style="list-style-type: none">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. <p>Dependency: A council approval for additional funding is required before Contract is officially signed and awarded. A Council report and funding request is anticipated to be presented in April 2022.</p>																										
	<table><tr><th>Project Timeline (Milestones)</th><th>Target date</th><th>Expected completion</th><th>Status <div>R</div></th></tr><tr><td>Implementation services – Negotiation</td><td>05/2021</td><td>03/2022</td><td></td></tr><tr><td>Implementation services contract ready</td><td>12/2021</td><td>03/2022</td><td></td></tr><tr><td>Council Approval and Contract Award</td><td>01/2022</td><td>04/2022</td><td></td></tr><tr><td>Implementation – Plan, Architect, Configure, Test, Deploy</td><td>02/2022</td><td>08/2023</td><td></td></tr><tr><td>Transition to operations, Post-Prod Support</td><td>05/2023</td><td>09/2023</td><td></td></tr></table>				Project Timeline (Milestones)	Target date	Expected completion	Status <div>R</div>	Implementation services – Negotiation	05/2021	03/2022		Implementation services contract ready	12/2021	03/2022		Council Approval and Contract Award	01/2022	04/2022		Implementation – Plan, Architect, Configure, Test, Deploy	02/2022	08/2023		Transition to operations, Post-Prod Support	05/2023	09/2023
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Key actions planned for upcoming period (Nov/Dec 2021)	Budget Update - current funding envelope is not sufficient to engage an Implementation Partner and complete the project. A request for additional funds will be brought to Council at a future meeting dependent upon negotiations. <div>Y</div>																										
	<ul style="list-style-type: none">Total Program budget: \$9,480,000<ul style="list-style-type: none">Total Expenditure: \$2,715,421 (Capital - including all commitments & Operating budget combined)																										
Stakeholder Engagement & Communication	Scope Update <div>G</div>																										
	<ul style="list-style-type: none">No change in scope at this time.																										
	Resource Update																										
	<ul style="list-style-type: none">Welcome new CIO/Sponsor – Chad MacDonald																										

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

Program Status Report – Enterprise Resource Planning (ERP) Program – Reporting

Reporting Period: Aug - Oct 2021
Reported By: Ade Ogunkoya, Project Mgr.

Critical Risks and Issues	Response Strategy
RISK(S) <ul style="list-style-type: none"> 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. 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. 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. 	<ul style="list-style-type: none"> 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. EAMS Project: A closer working relationship with the EAMS project team has been established with the expansion of the role of the ERP Senior Program Manager to the EAMs project as well for better oversight and collaboration. 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 Mitigate: A change management plan that is focused on better user adoption and reduction of change resistance will be developed.
ISSUE(S) <ul style="list-style-type: none"> Impact of Negotiation on Timelines, Budget and Scope: The impact of an extended Negotiation, earlier identified as a Risk, is now an active Issue. While negotiations are ongoing, the cost of running the ERP program (Staff and Software) continues and every month of extended negotiation pushes out the timeline of implementation and Go-Live. 	Issue Response: The City of Burlington/ERP Program negotiation team, led by the Chief Information Officer and supported by the Senior Program Manager, ERP Team, Procurement and Legal team, is working very closely with the potential Implementation Partner to work through the negotiation process and arrive at a decision as soon as possible. <i>Expected timeline can be found on Page 1 of this report.</i>

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.

Project Status Report – CRM

Reporting Period: Aug–Oct 2021
Reported By: Fabi Karimullah, Project Manager

Project Summary and Strategic Alignment	Overall Status: Y			
Implementation of a Customer Relationship Management (CRM) system and corporate Consolidated Contact Center model is a key initiative within the V2F Strategic Plan, <i>Focus Area 5 - Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation</i> .	Status Change [outline any changes] Remaining department implementations deferred due to re-prioritization of CRM within corporate projects. Project will be transitioned to Operations over 2022 & 2023 to allow required CRM activities to continue.			
Key achievements in last reporting period	Project Timeline (Milestones)	Target date	Expected completion	Status Y
<ul style="list-style-type: none"> CRM successfully launched to RPF Department with first-contact customer service transitioned to Service Burlington (Sep 27th) First CRM system integration to RPF Forestry work order system End user system and business process training for RPF & Service Burlington staff Stakeholder engagement & communications for RPF launch Launch of Answer Plus after-hours phone service in Service Burlington Vendor contract Change Request for CRM-Cartegraph integrations Updates to business continuity plan and support 	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	Complete
	CRM - Planning, Bldg & By-law	Q1/2022	Deferred	Deferred
	Budget Update Y <ul style="list-style-type: none"> \$3.11M approved budget to date; approximately \$2M in expenditures/commitments to year end 2021 \$1M requested in 2022 capital budget to retain skilled team members and continue activities & additional deployments in Operations mode 			
Key actions planned for upcoming period	Scope Update Y			
<ul style="list-style-type: none"> Budget request and resource planning for operationalization of CRM project and team resources Consultation with Building By-law section for 2022 CRM implementation Contract scope of work & costing for CRM implementation in Recreation, Community & Culture Consulting services engagement for MS Dynamics & Web Architecture review EAMS integrations 	Charter project scope reduced due to deferred implementation of Community Planning and Building & By-law depts. Continued work during transition to Operations will include: CRM-Cartegraph integrations; CRM web architecture review & upgrade; MS Dynamics V9 upgrade; additional department implementations as feasible including By-law in 2022.			
	Resource Update R <ul style="list-style-type: none"> Successful transition to operations and continued rollouts requires extension of project team resources to December 2023 and approval of FTE's in future operating budgets. 			
Stakeholder Engagement & Communication				
<ul style="list-style-type: none"> Regular engagement with CX Steering Committee, CX Working Group, Service Burlington and operationalized departments New department implementation planning Ongoing support for operationalized departments 				

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

Project Status Report – CRM

Reporting Period: Aug–Oct 2021
Reported By: Fabi Karimullah, Project Manager

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 implementation in required timeframe.	Mitigate: Deferred implementation of remaining in-scope departments through corporate re-prioritization. Extended timeframe for department rollouts through phased operationalization of project and resources; this response strategy will require additional budget.
2. Inadequate framework and resources to continue CRM activities and Customer Experience strategy when project transitioned to operations.	Mitigate: Restructuring plan to support CX & CRM has been submitted through DEOO and capital/operating budget for 2022/23. Ability to address operationalized activities is dependent on budget approval.
3. Failure to properly address resource changes in Service Burlington and impacted departments will affect staff and project deployment.	Mitigate: Engage HR to develop and guide staffing framework. This activity will be performed incrementally as departments are transitioned to CRM/Service Burlington.
4. Assessment of web, Microsoft Dynamics and integrations platform required to ensure long term sustainability of CRM system. CRM web product requires upgrade/enhancement to meet web and customer service standards.	Mitigate: Engage consulting services for recommendations on platform and web architecture.

Project Status - Additional Notes

- Project wrap-up report will be provided at next reporting cycle following the 2022 capital budget cycle.

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

Reporting Period: Q3 2021
Reported By: Bojan Sifrer, Project Manager

Project Summary and Strategic Alignment		Overall Status:			
<ul style="list-style-type: none"> 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. 		Status Change [outline any changes]			
		<p>Project timeline: Phase 2 activities reliant on integrations delayed (primarily SAP). Root causes: technical and business issues re SAP (Finance/Payroll/HR) integration; ITS integration team staffing issues. Project re-baselining in progress.</p> <p>Dependency: SAP integration requires assessment, review and approval by ESSC, expected completion: Jan 2022.</p>			
Key achievements in last reporting period		Project Timeline (Milestones)	Target date	Expected completion	Status
<ul style="list-style-type: none"> Transition, new project manager Initiation of Phase 2 – Linear Asset Implementation Services; business process reviews initiated, two completed (Cemetery, Sign Shop) Identification of 'connector' stakeholder representatives and completion of Business Advisory Team Defined CRM-Cartegraph integration scope of work Initiation, Linear Asset Capital Planning (Assetic) implementation Business confirmation, asset hierarchy data model 		Phase 2-1-1 – Core Services Integrations	Jun 21	TBD	Delayed
		Phase 2-1-2 – Corporate Inventory Management and Transportation stockroom setup	Jul 21	Jan 22	On Track
Key actions planned for upcoming period		Phase 2-1-3 – Onboard: Sign Shop	Aug 21	Jan 22	On Track
		Phase 2-1-4 – Onboard: Cemeteries	Aug 21	Jan 22	On Track
<ul style="list-style-type: none"> Phase 2 implementation activities, continued Business Advisory Team kick-off, approval of ToR Linear Asset Capital Planning (Assetic) software implementation Option assessment and recommendation: SAP integration Review data model/GIS impacts Scoping: AVL, Centracs integrations 		Phase 2-6 – Linear Asset Capital Planning (Assetic Implementation) (moved up per change order)	Nov 21	Apr 22	On Track
		Budget Update			
Stakeholder Engagement & Communication		<p>Total Program budget: \$4,356,300.</p> <p>Total Expenditure (to date): \$758,884.</p>			
		Scope Update			
<ul style="list-style-type: none"> Business stakeholder outreach: one-on-one meetings, identification of "connector" representatives to participate in Business Advisory Team. Enterprise Software Steering Committee (ESSC): Project status report. EAMS Project Advisory Committee: Project status report. Project implementation activities: business process reviews; Assetic software kick-off, workshops, training. EAMS Stakeholders: Project summary, Nov FOCUS, Dec BROADCAST. 		<ul style="list-style-type: none"> Addition of CRM-Cartegraph integration to managed scope. 			
		Resource Update			
		<ul style="list-style-type: none"> New Senior Program Manager added Oct 2021. New Project Manager joined team Oct 2021. 			

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

Reporting Period: Q3 2021

Reported By: Bojan Sifrer, Project Manager

Critical Risks and Issues	Response Strategy
<ul style="list-style-type: none"> SAP Integration: Complexity of SAP integrations with Cartegraph require significantly more staff, consulting and/or time resources than estimated impacting system configuration design and project schedule. Additional complexity associated with WorkDay integration (one transition, with SAP as interim). Region of Halton consultations not productive; alternate approach being assessed. 	<ul style="list-style-type: none"> Mitigate: Assess technical and business factors associated with integration. Determine alternate solution path. Present to ESSC for assessment and decision.
<ul style="list-style-type: none"> Staff capacity: Unavailable staff resources because of competing priorities and/or impact of COVID-19. 	<ul style="list-style-type: none"> 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.
<ul style="list-style-type: none"> Scope Creep: Project stakeholders request new requirements. 	<ul style="list-style-type: none"> Mitigate: All potential changes to scope will be brought to ESSC 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.
<ul style="list-style-type: none"> Low User Adoption: Project stakeholder adopt the new solution to varying degrees compromising project benefits. 	<ul style="list-style-type: none"> Mitigate: Development of a Change Management Strategy and execution of change management tactics following the City's adopted Enterprise Change Management model.
<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> Mitigate: Participation in standing integration meetings led by ITS with attendance of other project managers to discuss sequencing, timing and dependencies of various integrations.

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