CITY OF
Burlington

SUBJECT: **Corporate project status report – November and December 2021**

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

FROM: **City Manager's Office**

Report Number: CM-05-22

Wards Affected: All

File Numbers: 155-03-01

Date to Committee: March 2, 2022

Date to Council: March 22, 2022

Recommendation:

Receive and file city manager's office report CM-05-22 providing status reports for designated corporate projects for the period November through December 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), 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 November to December 2021.

Project Transition

Of note in the CRM status update is the transition from a project to continuing operations. The CRM project, commenced in 2018, involved the acquisition and implementation of technology and redesign of processes to support a centralized call center hosted in Service Burlington. To date, the Office of the City Clerk; Transportation; Roads, Parks & Forestry and Transit service areas have successfully partnered with the Customer Experience (CX) team to transition Tier 1 customer services enquiries to Service Burlington. In moving from project to continuing operations, additional service areas will be partnering with CX and utilizing CRM to further the CX strategy of Hear Me, Know Me, Inform and Assist Me.

Reporting Improvements

To date, we have provided information relative to 4 of the largest projects within the City's operations. In 2022, we will be expanding the subject of this reporting to include additional corporate projects to provide information to Committee and Council regarding the use of resources.

In an effort to improve the project status reports, modifications have been made to the report template. Changes include focusing on the overall project health, consolidating sections, and reporting on the plan to bring the project back on track (if applicable). The budget section has been expanded to include approved amount, spend to date, and budget health. In addition to this, critical risks and issues now include impact and probability to help provide additional insight into decision making.

The criteria for evaluating a project's health status have been updated to reflect the project management practices found within Information Technology Services. These include changes to the quantitative measures with a focus on the triple constraint, which includes scope, schedule, and cost.

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 May 2022 covering the period January through March 2022.

Respectfully submitted,

Sheila M. Jones	Chad MacDonald	Angela Morgan
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Risk & Accountability		Customer Experience
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Appendices:

A. CM-05-22 Appendix A: Corporate Project Status reports

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.