Corporate Project Status Reports – November to December

Project Status Indicators

	Green	Yellow	Red
Budget	The project is expected to complete within the approved budget with a possible deviation of less than 5%.	The project is at risk (likelihood > 50%) of going over budget by more than 5% but less than 20%.	The project is at risk (likelihood > 50%) of going over budget by more than 20%.
Schedule	The project is on track for completion as per the approved delivery date with a possible deviation of less than 5%.	The project is at risk (likelihood > 50%) of missing the delivery date by more than 5% but less than 20%.	The project is at risk (likelihood > 50%) of missing the delivery date by more than 20%.
Scope	The project is on track to achieve the approved scope.	The project may be at risk of failing to achieve the approved scope.	The project is at high risk of failing to achieve the approved scope.
Overall Health	The project is currently on track.	The instant that a yellow state above is present, the overall project health becomes yellow.	The instant that a red state above is present, the overall project health becomes red.

Program Status Report – Enterprise Resource Planning (ERP) Program
Reported By: Ade Ogunkoya, Project Mgr.; Robert Delorme, Snr. Program Mgr.

Reporting Period: Nov – Dec 2021 (Q4)

Overall Health
R

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.
  - Workday solution implementation for Human capital management, Financials, Payroll, Budget & Planning and Reporting & Analytics
- Aligned to Vision to Focus (Focus Area 5) and the corporate IT Strategy

Key Achievements in Reporting Period

- Negotiation with Implementation Partner - Review of Statement of Work and Legal terms is ongoing.
- Risk identification and analysis reviewed periodically and/or as required.
- RAID (Risk, Action, Issues and Decisions) Log activated and maintained
- Revamped the ERP Program 360 page for internal stakeholders ERP Program
- ERP Program team in Workday training as part of prep for Implementation.
- ERP Workday Demo sessions on Core Finance and HR processes including self serve – delivered to connectors by the ERP team members.
- Privacy Impact Assessment in collaboration with city approved 3rd party privacy assessor.
- Engagement of core departments with critical/high impact to ensure the ERP Program is accounted for on their workplan for 2022.

Key Actions Planned for Upcoming Period

- Negotiations continue between the City and the potential Implementation Partner
- Business Process Management continues in all identified workstreams (HCM, Finance, Payroll, Technical)
- Data identification and cleansing for all workstreams to continue.
- Business Process and Policy review, Re-engineering and approval continues.
- Change Impact Assessment to identify and manage the expected change to processes, roles and responsibilities.

Status Update and Plan to Green (if applicable)

- Project Timeline – Final timeline is dependent on negotiations and contract award to the successful Implementation Partner.
  - 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.
- ✓ Overall Health will get back on track (Green) when Timeline is rebaselined after the Implementation Partner is selected and approved by Council.

Project Milestones	Target Date	Expected Completion
Implementation services – Negotiation	05/2021	03/2022
Implementation services contract ready	12/2021	03/2022
Council Approval and Contract Award	03/2022	04/2022
Implementation – Plan, Architect, Configure, Test, Deploy	04/2022	08/2023
Transition to operations, Post-Prod Support	05/2023	09/2023

Budget

Approved Amount	$9,480,700
Spent to Date/Total Expenditure (Including commitments till 2023)	$4,153,489
Trend / Health	R

Program Status Report – Enterprise Resource Planning (ERP) Program
Reported By: Ade Ogunkoya, Project Mgr.; Robert Delorme, Snr. Program Mgr.

Reporting Period: Nov – Dec 2021 (Q4)

Critical Risks	Likelihood	Impact	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.	Medium	Medium	• **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.

• **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.	Medium	Medium	• **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
• **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.	Medium	Low	• **Mitigate:** A change management plan that is focused on better user adoption and reduction of change resistance will be developed.

Critical Issues	Impact	Response Strategy
• **Impact of Negotiation on Timelines, Budget and Scope:** The impact of an extended Negotiation that was 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.	High	• 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. Expected timeline can be found on Page 1 of this report.

Program Status Report – Enterprise Asset Management Solution (EAMS)
Reported By: Bojan Sifrer, Project Mgr.; Robert Delorme, Snr. Program Mgr.

Reporting Period: Nov – Dec 2021 (Q4)

Overall Health

R

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 Reporting Period

- Core Services design continuing
- Transportation business process review continuing
- Linear Asset Capital Planning initiated
- Communications/Stakeholder Management: Business Coordination Team kick-off

Key Actions Planned for Upcoming Period

- Confirm SAP integration solution; develop plan
- Re-baseline project
- Continue with Core Services
- Transportation Services and Linear Asset Capital Planning continuing
- Roads, Drainage, Sidewalks initiated
- Integrations: CRM continuing; StoneOrchard (initial) completed
- Communications/Stakeholder Management program continuing

Status Update and Plan to Green (if applicable)

- Project schedule impacted by issues with SAP integration and related financial configuration.
- Plan: Scope of financial integration/configuration issues will be assessed (nearing completion as of this report). Solution options to be reviewed and path to be confirmed with applicable consultation. On confirmation, plan will be developed to complete integration/configuration tasks and overall project plan re-baselined and budget reviewed.
- To mitigate broader project impact, activities without immediate dependency on financials are moving forward or in planning.

Project Milestones

Project Milestones	Target Date	Expected Completion
Phase 1-1 Core System	Jul 2021	To be re-baselined
Phase 2-1 Business Services and Core Components	Jan 2022	To be re-baselined
Phase 2-2 Transportation Services	Jun 2022	To be re-baselined
Phase 2-3 Roads, Drainage, Sidewalks	Nov 2022	To be re-baselined
Phase 2-4 RPF, Parks, Horticulture, Turf, Parks & Rec	Feb 2023	
[Major milestones to next 12 months cited.]		

Budget

Budget	
Approved Amount	$4,356,300
Spent to Date/Total Expenditure (Including commitments till 2023)	$1,422,045
Trend / Health	R

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

CITY OF BURLINGTON

Program Status Report – Enterprise Resource Planning (ERP) Program

Reported By: Ade Ogunkoya, Project Mgr.; Robert Delorme, Snr. Program Mgr.

Reporting Period: Nov – Dec 2021 (Q4)

Critical Risks	Likelihood	Impact	Response Strategy
• **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.	High	Medium	• **Mitigate**: Participation in standing integration meetings led by ITS with attendance of other project managers to discuss sequencing, timing and dependencies of various integrations
• **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.	Medium	High	• **Mitigate**: Adapt/adopt decision making guidelines per ERP project, linked to the ESSC decision makers as defined in the ESSC Terms of Reference. Use to guide the decision-making process for the project. The guidelines will identify all decision maker(s) and will expedite decision timelines.
• **Scope Creep:** Project stakeholders request new requirements.	Medium	Medium	• **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.
• **Scope Adjustment:** Updated requirements (examples: Privacy Impact Assessment; Cartegraph-Enterprise GIS integration; Stone Orchard integration).`	High	Medium	• **Accept**: Requirements updated to reflect new business process information and workflow complexity identified during discovery.
• **Staff capacity**: Unavailable staff resources because of competing priorities and/or impact of COVID-19.	Medium	High	• **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.

Critical Issues	Impact	Response Strategy
• **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 third party software integration is problematic; alternate approach being assessed.	Project delay Project budget risk	• Assess technical and business factors associated with integration. Determine alternate solution path and associated recommendations. Present to ESSC for assessment and decision. Develop plan to implement. Re-baseline project to reflect plan.

Overall Health
Y

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 of Project

- Implementation of a consolidated contact center, system and data source for customer relationship management
- Deployment of the CRM and partnerships with 4 of 6 departments in project scope: Clerks, Transportation, RPF, and Transit
- Reduction in number of disparate phone numbers and emails published for above departments simplifying customer access to the City
- System data and staff resources that allow City to adapt with greater flexibility, e.g. contact center staffing model to accommodate busy periods for each service area
- Consistency in customer experience and quantitative performance management through service level standards established by onboarded departments
- Resolving more enquiries at first contact, with KBA's supporting multiple service areas

Key Actions Planned During Transition to Operations

- Collaboration with Building By-law unit for CRM implementation
- Consulting services engagement for MS Dynamics & web architecture
- CRM-EAMS system integrations
- CRM Microsoft Dynamics v.9 migration
- CRM enhancements and operational support

Stakeholder Engagement & Communication

- Regular engagement with CX Advisory Group, CX Working Group
- Partnerships established between Service Burlington and operationalized departments via ongoing user group meetings and service related updates
- Engagements will continue with non-CRM departments to implement CRM and/or to sustain customer service expectations in a mixed use model

Status Change

Project de-scoped due to pandemic and alignment with broader corporate priorities. Project will be transitioned to Operations over 2022 & 2023 to allow required CRM activities to continue.

Project Milestones Summary — Status: G

Project Milestones Summary	Target date	Expected completion	Status
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 — G

- Approved budget to date: $4.11M
- Estimated expenditures to March 2021 (transition date: $2.09M
- Budget remaining: $2.02M

Scope Update — G

Project Charter scope to exclude (defer) Community Planning and Building & By-law depts. This marks completion of the agreed scope of work within the defined constraints of a project. Capital budget has been approved to allow a gradual transition to operations over a 2 year period. Work will continue during this time and beyond to support additional rollouts and continuous improvement of the CRM.

Resource Update — Y

Transition to Operations including additional rollouts and support for CRM will require approval of FTE's in future operating budgets through Designing & Evolving Our Organization.

Critical Risks and Issues	Response Strategy
1. 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.
2. Failure to properly address resource changes in Service Burlington and departments transitioning to consolidated contact center model 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.
3. 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 Transition - Additional Notes
Key Lessons Learned: • Initially addressing the project as a technical implementation without oversight and corporate buy-in for Customer Experience vision & strategy • The need to include organizational change management in project delivery including a framework to manage impacts to staff positions • The opportunity for corporate risk management to address risks that cannot be managed within the project (e.g. pandemic, competing priorities) • The need to address non-CRM departments in the Service Burlington and CRM deployment plan • Underestimating the impact of CRM within the broader technology architecture