Corporate Project Status Reports – April to June 2022

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.

CITY OF **Burlington**

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

Reporting Period: April – June 2022

Overall Health

G

Project Summary

- 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

- Kainos (Implementation partner) Onboarding
- Kick Start the Plan stage with some activities such as:
  - Develop and Approve new Project Timeline (New Baseline)
  - Develop and Approve Project Charter
  - Align Schedule and tasks with available Resources
  - Foundational Data Model build for Finance Workstream
  - Change Management event Kick off
  - Discovery sessions for Human Capital Management Workstream
  - Official Project Kick Off

Key Actions Planned for Upcoming Period

- Business Design Sessions for every Process, SKU and Workstream.
- Develop and Approve Integrated Project Plan
- Develop all Configuration Workbook – Draft 1
- Data Conversion Workbook
- Customer Confirmation Sessions
- Start Unit Testing

Status Update and Plan to Green (if applicable)

- As a major task in the Plan Phase, Project was re-baselined with Go-Live planned for June 2023 therefore, based on the new approved Timeline, Project is on Time and on budget.
  - Some identified risks and issues may impact the overall status, but these continue to the managed.

Project Milestones	Target Date	Expected Completion
Plan Phase	April 2022	June 2022
Architect & Design Phase	June 2022	October 2022
Configure & Unit Test	October 2022	December 2022
Testing and Training	January 2023	April 2023
Deploy	May 2023	June 2023
Transition to operations	June 2023	July 2023

Budget

Approved Amount	$13, 980, 700
Spent to Date	$3, 286, 670
Trend / Health	G

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

Reporting Period: April – June 2022

Critical Risks	Likelihood	Impact	Response Strategy
• **Dependency on output from other City projects and initiatives -** special focus on the Non-Union Job Evaluation Initiative. The ERP Workday implementation project (majorly the Human Capital Management workstream and subsequently the Financial/Payroll workstream) has a strong dependency on the output of the Non-Union Job Evaluation project. The HCM foundation of Workday solution is built on our Job Architecture. • There is the possibility that the timelines of the ERP program may not align with the JE timelines. If this happens, there will be delays and/or missed opportunity for updated Job Evaluation to be part of the transformation.	High	High	• **Mitigate:** Stay connected with other Project Managers and Sponsors to continue to identify dependencies, expected outcomes and align timelines. • **Job Evaluation**: The ERP Program team has continued to work with the Job Evaluation (JE) team to ensure we are aligning timelines and expectation. • **Other Data Set-Up options**: Should this risk become an issue, the ERP team and the JE team are also looking at other set of Data option to use by considering all pros and cons.
• **Shared Resources with Other Corporate Projects**: Due to the dependencies of the ERP Project and the EAMS Project on each other, there is also the shared dependency on resources which may impact delivery time on some tasks	Medium	Medium	• **Mitigate:** Stay connected with other Project Managers and Sponsors to continue to identify dependencies, expected outcomes and align timelines.
• **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	Medium	• **Mitigate:** A change management plan that is focused on better user adoption and reduction of change resistance is developed and currently being actioned.
Critical Issues	**Impact**	**Response Strategy**	
• No Critical Issue to report for Q2 2022.			

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

Reporting Period: April – June 2022

Reported By: Bojan Sifrer, Project Mgr. and Robert Delorme, Snr. Program Mgr.

Overall Health

R

Project Summary

- 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 Update and Plan to Green (if applicable)

- Recommendation re financial integration presented to Enterprise Software Steering Committee (ESSC) May 5 and approved. EAMS will integrate directly to Workday.
- Project schedule is being re-baselined as of this report; overall delay of 10-14 months is projected. Project budget impact is being reassessed as of this report.
- Business and data process discoveries for Workday, Corporate Stores, and first sub-phases of Linear Assets underway as of end of June.

Key Achievements in Reporting Period

- Financial integration path resolved
- Project re-baselining in progress; budget impact assessment in progress; applicable change order development in progress
- Workday integration (business discovery) initiated
- Linear Asset Capital Planning workshop program underway, to be completed by end of June
- Prep work pilots continuing for: bulk data collection; legacy data access/decommissioning
- Azure AD user authentication revision: plan developed
- Comm./Stakeholder program continuing (this period: Director connect re data model)
- Privacy Impact Assessment (PIA) continuing

Project Milestones

Project Milestones	Target Date	Expected Completion
Phase 1-1 Core System	Jun 2021	Jul 2021
Phase 2-1 Business Services and Core Components	Q3-Q4 2023	Q3-Q4 2023
Phase 2-2 Transportation Services	TBD	Being re-baselined
Phase 2-3 Roads, Drainage, Sidewalks	TBD	Being re-baselined
Phase 2-4 RPF, Parks, Horticulture, Turf, Parks & Rec	TBD	Being re-baselined
Phase 2-5 Forestry Services	TBD	Being re-baselined

Key Actions Planned for Upcoming Period

- Completion, new project baseline, project budget impact assessment
- Continue with: Workday integration; Core Services; Corporate Inventory; Linear Asset business processes/data
- Continue Comm./Stakeholder program

Budget

Approved Amount	$4,356,300
Spent to Date	$1,450,087
Trend / Health	R

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

Reporting Period: April – June 2022

Critical Risks	Likelihood	Impact	Response Strategy
• **Complex and Changing Integration Environment:** EAMS related integrations (Workday, CRM) and strong co-dependency (Workday) require additional work/rework and close coordination requirements with other projects and 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. Work closely with other project managers to coordinate effectively.
• **Timely Decisions and Approvals**: The combined EAMS-ERP (Enterprise Resource Planning) program will require change/reviews in many 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 originally developed for the ERP project for EAMS project application, and potentially for broader enterprise application, as cited in the ESSC Terms of Reference. Use to guide the decision-making process for both projects. The guidelines identify all decision maker(s) and will expedite decision timelines. Apply escalation as risk warrants.
• **Scope Adjustment:** Privacy Impact Assessment; Enterprise GIS integration	High	Medium	• **Accept:** Requirements updated to reflect new business process information and workflow complexity identified during discovery.

Critical Issues	Impact	Response Strategy
• **Approval of budget extension:** Budget extension will be required to complete the project. The amount is under assessment as of this report.	Ability to complete project	• Avoid: Develop budget extension estimate with comprehensive supporting detail and stakeholder input to ensure efficient review and approval.

Overall Health

G

Project Summary

- Deploy modernized, intuitive and easy to use enterprise AVL software that enables enhanced customer service and streamlined business processes.
- Aligned to Burlington Strategic Plan 3.2b 'The city's operations are net carbon-neutral' and 4.1.b 'City information is more accessible with an increase in the number of residents who engage with the city. The city practices open government and uses new technology to engage residents and collaborate in decision-making'. Aligned to Vision to Focus (Focus Area 3 'Supporting Sustainable Infrastructure and a Resilient Environment' & Focus Area 5 'Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation').

Key Achievements in Reporting Period

- Change Management Plan – Project Benefits updated
- Implementation of AVL Hardware 100% complete
- First AVL newsletter release
- Testing of tablets completed
- BLT and Council presentation on AVL
- PIA review and update

Key Actions Planned for Upcoming Period

- Training for Driver vehicle inspection reports (DVIR) and Hours of Service (HOS)
- Prepare data for integrations (Webfocus, BI)
- Establish Project Governance and Procedures
- In cab mount installations
- Opti path route optimization pilot
- Update PIA

Status Update and Plan to Green (if applicable)

- Training for Hours of Service (HOS) and Driver Vehicle Inspection Report (DVIR) will resume after staff resource is in place
- Working through technical issues with vendor for HOS/DVIR

Project Milestones	Target Date	Expected Completion
Privacy Impact Assessment	02/22	7/22
AVL Winter Hardware Installation and Turn by Turn Configuration	02/22	09/22
System Integrations	02/22	12/22
Completion of Training (over 280 users)	09/22	12/22
Project Governance structure and responsibilities	09/22	09/22
Project close	9/22	Re-baseline

Budget

Approved Amount	$1,858,186.00
Spent to Date	$360,265.82
Trend / Health	G

Critical Risks	Likelihood	Impact	Response Strategy
• Project resourcing – There is no dedicated project staff. If a core team member leaves or takes on another role within the city, this will cause a delay	High	High	• If/when team members leave, Project Sponsor, Project Manager and Fleet Manager to determine who will take on the role in temporary capacity to cover tasks.
• No dedicated resource post implementation to manage the AVL system	High	High	• The Corporate Fleet Business Improvement Specialist will be managing the AVL system but the position is currently temporary and not full time. A full time resource is required for contract management, hardware and software requirements, continuous improvement, governance and administration of the system.
• Vendor did not previously disclose usage of a third party application – The vendor advised the City in January that part of the Focus suite is managed by a third party vendor. The software suite in question manages the DVIR and HOS application for operators, and the vendor is located outside Canada and in the United states.	High	Low	• The City has established an internal working group to review recommendations and what changes, if any, are required.

Critical Issues	Impact	Response Strategy
• **Privacy Impact Assessment (PIA)** has moved from a critical risk to a Project Issue. The PIA report has identified several recommendations for the City.	2-3 month	The City has established an internal working group to review recommendations and what changes, if any, are required. PIA will be updated to reflect policy and procedures updates Vendor will migrate data from US to Canada by October 2022

Program/Project Status Report – Non-Union Job Evaluation
Reported By: Laura Boyd, Executive Director, Human Resources and Marylisa Forsyth, HR Representative

Overall Health
Y

Project Summary

- The Job Evaluation Project is a foundational component of attraction and retention and enables the City to update our non-union compensation design and structure to be reflective of current and future workplace requirements. It is also supporting the City in its ability to be externally competitive and internally consistent among job positions and titles.
- Deliverables include (1) new job evaluation plan uniformly and fairly applied to all non-union jobs, (2) new structure and compensation philosophy (3) repository of fully evaluated non-union job descriptions with consistent application of titles and (4) pay equity review of the results

Key Achievements in Reporting Period

- Continue with the review by the Consultant and internal team of 5 compensation related policies (Vacation, Salary Treatment, Flexible working hours, acting Pay and Temporary Acting Duties, and non-Union Rating Committee)
- Rating of 100 benchmark positions utilizing the new Job Evaluation rating system
- Follow up on JIQ completions and approvals
- Confirmed benchmark positions for market analysis with newly rated benchmark positions
- Confirmed market comparators
- Continue to engage and communicate with employees

Key Actions Planned for Upcoming Period

- Finalize recommendations regarding policy updates and present to BLT
- Draft new compensation grade structure that is reflective of the organizations size and compensation philosophy.
- Start the development of naming principles for job titles
- Rating Committee to review results of 100 positions and confirm ratings

Status Update and Plan to Green (if applicable)

- Project Timelines – Final timelines are dependent on the completion and quality of JIQs by internal city staff, the work of the Consultant and the availability of the Non-Union Job Evaluation Rating Committee
- Overall health will get back to track (Green) when Job Information Questionnaires are rated, results approved, salary structure and title nomenclature and finalized and funding in place to implement.

Project Milestones

Project Milestones	Target Date	Expected Completion
Develop modernized Job Evaluation Plan	Q1 2021	completed
Design, train & complete Job Information Questionnaires (JIQ)	Q2 2021	95% completed
JIQs approved by two levels of supervisor	Q4 2021	95% completed
Ratings Assigned	Q2 2022	33% completed
Jobs placed in new salary structure and recommend new titles	Q1 2023	Revised & On track
Update Compensation Policies	Q4 2022	Revised &On track
Communicate Results	Q3 2023	On track
Up-to date repository of JIQ's	Q1 2023	On track

Budget

Approved Amount	$182,000 for consultant services
Spent to Date	$114,071.60
Trend / Health	Y

Legend: **R** = At Risk   **Y** = Warning   **G** = On Track   **Page 9**

CITY OF Burlington

Reported By: Laura Boyd, Executive Director, Human Resources and Marylisa Forsyth, HR Representative

Critical Risks	Likelihood	Impact	Response Strategy
• Project timeline may be impacted based on: ○ the cost and approvals to implement the findings of both the Job Evaluation results and the market assessment ○ Cost to implement the recommendations for the compensation related policy updates and required approvals ○ Staffing available to complete tasks.	High	High	• **Mitigate:** Stay connected with Steering group and Sponsors to clearly identify outcomes as soon as they are known and design a phased implementation plan in accordance with the approved budget
• Acceptance by City Employees of the new job evaluation project outcomes: This project touches compensation both current and future for all non-union employees and they need to understand the outcomes and process to get to the outcome.	Medium	Medium	• **Mitigate:** Change management plan including a clear communicate plan and regular updates on 360
• Change Resistance: The amount of change associated with the JE project, the length of time to implement from start to finish along with other initiatives within the organization on the Stakeholders could cause change resistance or change fatigue.	Medium	Medium	• **Mitigate:** A change management plan that is focused on reduction of change resistance will be developed, commence Job Evaluation Roadshows connecting with People Leaders
• Incomplete, out of date and poor quality JIQs submitted or approved by departments	High	Medium	• **Mitigate:** Continue to work with Directors and Executive Directors to encourage completion. If not completed, current job descriptions will have to be used going forward. Stay up to date with newly created or revised positions to ensure JIQs are reflective of position scope
• Timing with ERP – if this project can't meet the ERP timelines, then this project will have to wait until ERP is complete to continue. This will result in additional costs and resources required to reconfigure and update the Workday system and will cause a delay in roll out of new compensation grades/structure.	High	High	• **Mitigate:** Continue to work with Consultant to expediate findings to ensure we are aligning timelines and expectations. Make a decision to pause this project or provide more resources to focus and complete.
• Staffing of Project: Project is being completed off the side of a Human Resources employee's desk. Employee is on contract until the end of 2022.	High	High	• **Mitigate:** May need to consider a short term contract for 2023 to finish off the key components of the project. Transfer responsibility to Manager of Compensation and Benefits once hired.

Critical Issues	Impact	Response Strategy

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

CITY OF Burlington

Program/Project Status Report – Web Modernization

Reported By: Kyle Conway, Mgr., Creative & Digital Services; Kwab Ako-Adjei, Dir. Corp. Communications & Engagement

Reporting Period: April – June 2022

Overall Health

G

Project Summary

- Core purpose for this project is to provide a fulsome review and refresh to burlington.ca, calendar.burlington.ca and burlingtontransit.ca websites with an emphasis on online services and improved user experience.

- Aligned to: Focus Area 5 – Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation
  - Enhancing City services and delivery of citizen self-service options through technology
  - Enhancing and emphasizing a customer first approach in all city service areas

Status Update and Plan to Green (if applicable)

- Project is on time and on budget. The critical risks and issues identified may impact the overall status, but these continue to the managed.

Key Achievements in Reporting Period

- Technical Needs Assessment
- Content and Document Import
- Microsite and directory page template development
- Configuration of updated news feed module
- Configuration of updated document module tool for by-laws
- Implementation of Cludo site search and enhancements, including: Voice search and intelligent 404
- Development of updated Parser pages (for applying site design to standalone apps) – In Progress
- Configuration of updated facilities manager module -
- Configuration and implementation of Google GA4 analytics – In Progress

Project Milestones

Project Milestones	Target Date	Expected Completion
Draft website (Corporation Setup)	March 2022	March 2022
Document Import	July 2022	July 2022
Complete Development of Website	June 2022	June 2022
New site launch	July 21, 2022	July 21, 2022
Project Close Out	July 2022	July 2022

Key Actions Planned for Upcoming Period

- Redirects for Vanity URLs (burlingtontransit.ca, haltoncourtservices.ca)
- Redirects for top popular 100-200 webpages (based on annual site analytics)
- Redirects updated on existing short (friendly) URLs
- Migration of existing news posts and subscribers – Planned for 2 weeks prior to launch
- Migration of existing calendar events and subscribers – Planned for 2 weeks prior to launch
- Launch new site

Budget

Budget	
Approved Amount	$211,000
Spent to Date	$128,887
Trend / Health	G

Program/Project Status Report – Web Modernization

Reporting Period: April – June 2022

Reported By: Kyle Conway, Mgr., Creative & Digital Services; Kwab Ako-Adjei, Dir. Corp. Communications & Engagement

Critical Risks	Likelihood	Impact	Response Strategy
Timely Approvals and Work Completion from Content and Document Owners	High	High due to potential to delay launch of the site.	Regular follow up discussion with owners with clear timelines. Content that is approved by Project Manager (and Communications team members) will be uploaded to new site.
Scope Creep: Project stakeholders request new requirements.	Medium	High due to potential to delay launch of the site and increased cost.	All potential changes to scope will be brought to Customer Experience Advisory Team and/or BLT following assessing impact to schedule and budget. Risk of implementing the change and risk of not implementing the change will also be assessed.

Critical Issues	Impact	Response Strategy
Migration of existing documents to new site.	High due to potential to delay launch of the site.	Second Corporate Communications & Engagement (CCE) staff or part time support staff to refocus priorities to support document migration to the web to ensure that all content required is ready for go live.
Hosted Service Agreement not being complete in time for site launch	High due to unexpected costs that may be incurred without a contract.	Work has been underway, however, workload in different departments have contributed to delay. CCE will continue to work with key departments to get agreement in place.

Program/Project Status Report – Property Tax Software Program
Reported By: Maxine Rukundo, Project Manager; Ann Marie Coulson, Project Champion

Reporting Period: April – June 2022

Overall Health

G

Project Summary

- Implementation of the CentralSquare property tax software solution (CS).
  - The property tax software is used to bill and collect property taxes, process tax adjustments and track, inquire, and report on property tax records. The tax software is used to bill and collect property taxes on behalf of the City, Region and local school boards.
- Aligned to Vision to Focus – Focus Area 5- Delivering Customer Centric Services with a focus on efficiency and technology transformation.

Key Achievements in Reporting Period

- Business Process Review has commenced
- Conversion Environment has been loaded
- Validation of the configuration has started
- Project Planning and Initiation complete
- End user workflow orientation is underway
- RFQ on Privacy Impact Assessment (PIA) under review

Key Actions Planned for Upcoming Period

- Business Process Review ongoing
- Ongoing training of project team
- Privacy Impact Assessment (PIA) draft report
- Iterative Design & configuration (including integrations)
- Data migration and conversion commencing
- Milestone 1 scheduled for completion

Status Update and Plan to Green (if applicable)

- Project has commenced and working towards the completion of our first milestone of project plan.
- Burlington continues to be apart of CS Early Adopters User Group Program which includes other Ontario municipalities in the process of replacing their property tax billing and collection software system.

Project Milestones	Target Date	Expected Completion
Project Initiation and Plan	01/2022	03/2022
Privacy and Risk Assessment	04/2022	09/2022
Data Conversions	04/2022	09/2022
Configuration & Integration	05/2022	09/2022
Testing and Training	09/2022	02/2023
Deployment and Project Close	02/2023	03/3023

Budget

Approved Amount	$1,500,000
Spent to Date (including commitments)	$420,762
Trend / Health	G

Program/Project Status Report – Property Tax Software
Reported By: Maxine Rukundo, Project Manager; Ann Marie Coulson, Project Champion

Reporting Period: April – June 2022

Critical Risks	Likelihood	Impact	Response Strategy
• Managing the availability of required resources over the summer months (2 months) to continue the momentum of ongoing project activities to meet agreed upon project timeline.	Low	Low	• **Risk Mitigation:** The Property Tax project team (vendor and city) will adjust the project schedule and resource plan to ensure completion of required activities are met within the agreed upon timeline.
• CS has limited experience integrating their solution to Amanda software. For the tax software, integration is required for a subset of people and property records.	Medium	Medium	• **Risk Mitigation:** For this software the City only requires a subset of people records and property records to be synced between the two systems. Burlington and Oakville are working together to support CS on the development of Amanda workflows and use cases. The vendor is implementing the tax software solution with many municipalities utilizing the Amanda property data base. (Oakville, Windsor and Hamilton). Municipalities will work in tandem with the vendor on the integration.

Critical Issues		Impact	Response Strategy
• N/A			