

CM-02-23 Appendix A

Corporate Project Status Reports – December 2022 to January 2023

Project Status Indicators

Factor	Status	Green	Yellow	Red
Budget – In-Year		The project in-year expenditures are expected to be completed within the approved budget with a possible deviation of less than 5%.	The project in-year expenditures are at risk (likelihood > 50%) of going over budget by more than 5% but less than 20%.	The project in-year expenditures are at risk (likelihood > 50%) of going over budget by more than 20%.
Budget – Future		Future funding is allocated and committed.	Approved funding is not sufficient to complete the project. Additional funding will be required in a subsequent budget.	Approved funding is not sufficient to complete the project. Additional funding will be required in a subsequent budget but required amount is unknown.
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.

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Program/Project Status Report – Enterprise Resource Planning (ERP) Program

Reporting Period: Dec 2022 – Jan 2023

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

Project Summary
<ul style="list-style-type: none"> Business transformation initiative focused on people, processes, technology, data, and information required to deliver human resources, payroll and financial functions. <ul style="list-style-type: none"> Workday solution implementation for Human Capital Management, Financials, Payroll, Reporting & Analytics Aligned to Vision to Focus (Focus Area 5) and the corporate IT Strategy

Key Achievements in Reporting Period
Oct – Dec 2022: Data Harvesting - Extract, Transfer, 2 nd Load
Dec 2022 – Jan 2023: Data Validation – Data accuracy and completeness checks
Aug 2022 – Jan 2023: System integration development
Nov 2022 – May 2023: Change management/impact assessment to feed into user readiness tactics and planning
Dec 2022 – Feb 2023: Communication, Training and Stakeholder Plan development – In Progress
Jan 2023: End to End testing: Kick off
Jan 2023: System Cutover planning: Kick off
Jan 2023: People Change Impact: Kick off

Key Actions Planned for Upcoming Period
Dec – Jan 2023: 2 nd instance of our Workday environment for end-to-end testing (COB2)
Feb – Mar 2023: End to End testing – Including Integration and Data validation testing
Jan 2023: System integration development continues
April 2023: Payroll Parallel testing – Payroll Verification and Validation - First cycle
Feb – Apr 2023: Business Readiness plan and the Stakeholder and Process Impact summary

Health Check				Overall
Scope G	Schedule G	Budget: In-Year G	Budget: Future G	G

Status Update and Plan to Green (if applicable)
<ul style="list-style-type: none"> The Enterprise Resource Planning program is going according to Plan – Schedule, Budget, Scope are trending green and looking good for a July 2023 Go-Live

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

Budget	
Approved Amount	\$13,980,700
Spent to Date	\$8,182,364

Program/Project Status Report – Enterprise Resource Planning (ERP) Program

Reporting Period: Dec 2022 – Jan 2023

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

Critical Risks	Likelihood	Impact	Response Strategy
<ul style="list-style-type: none"> • Dependency on output from other City projects and initiatives - Special focus on the Enterprise Asset Management project (EAMS). The ERP Workday implementation project (both the Human Capital Management workstream and Financial/Payroll workstream) has a strong dependency on the output of Business decisions that will impact final Workday Process design and ultimately, integration design. <ul style="list-style-type: none"> • There is the possibility that the timelines of the ERP program may be stretched to accommodate the expected changes due to the dependency on the EAMS project. <ul style="list-style-type: none"> • If this happens, there will be delays and/or immediate missed opportunity for all the process optimization expected. 	High	High	<ul style="list-style-type: none"> • Mitigate: Stay connected with other Project Managers and Sponsors to continue to identify dependencies, expected outcomes and align timelines. The ERP Program team has continued to collaborate with the EAMS team to ensure we are aligning timelines and expectation. • Other options: Should this risk become an issue, the ERP team and the EAMS team will investigate and realign, prioritise and focus on the most critical pieces of work with the limited resource and/or time available.
<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Mitigate: Decision making guidelines, linked to the Enterprise Software Steering Committee (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
<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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
<ul style="list-style-type: none"> • No Critical Issue to record. 		

Legend: ● R = At Risk

● Y = Warning

● G = On Track

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

Reporting Period: Dec 2022 – Jan 2023

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

Health Check				Overall
Scope G	Schedule G	Budget: In-Year G	Budget: Future R	R

Status Update and Plan to Green (if applicable)
<ul style="list-style-type: none"> Scope: Minor adjustments addressed as part of requirements discovery; understood at outset and being addressed via change orders. (Green) Schedule: Tracking to re-baselined milestones. (Green) In year budget on-track (2023). (Green) Future budget at risk. Additional capital funding required through 2024 budget cycle. Defining budget need in progress. See Critical Issues (Red) Currently underway: Workday integration specification; configuration and data requirements for Transportation, Fleet, Roads & Drainage, and Corp. Inventory sub-phases.

Project Milestones	Target Date	Expected Completion
Phase 1-1 Core System	Jun 2021	Jul 2021
Workday Integration	Jul 2023	-
Phase 2-1 Business Services and Core Components	Aug 2023	-
Phase 2-2 Transportation Services	Sep 2023	-
Phase 3-1 Fleet	Jan 2024	-
<i>Later phases addressed in subsequent reporting</i>		

Budget	
Approved Amount	\$4,356,300
Spent to Date	\$2,059,137

Project Summary
<ul style="list-style-type: none"> Implementation of an enterprise software solution to improve asset maintenance and capital planning activities for the city of Burlington’s assets including linear, fleet, equipment, and facilities. 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
<ul style="list-style-type: none"> Workday integration (business) specification nearing completion Sub-phase business/data discovery and data review/prep continuing or initiated: <ul style="list-style-type: none"> Transportation Fleet (Corporate, Transit and Fire) Roads-Drainage-Sidewalks-Transit Stops Corp. Inventory Related minor integrations being scoped as applicable Communications/Stakeholder program continuing Director session re asset data owner-maintainer and related workflows

Key Actions Planned for Upcoming Period
<ul style="list-style-type: none"> Workday integration business specification to implementation partners Transportation sub-phase business process documented Continuing with sub-phase business/data discovery and data review/prep: <ul style="list-style-type: none"> Fleet (3 groups) Roads-Drainage-Sidewalks-Transit Stops Prepare budget impact assessment, initiate processing of associated change order(s) with implementation partner Continue Communications/Stakeholder program

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



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

Reporting Period: Dec 2022 – Jan 2023

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

Critical Risks	Likelihood	Impact	Response Strategy
<ul style="list-style-type: none"> Project Staffing: The EAMS Project team is lean-staffed and has no redundancy in key roles. Resource changeover continues to happen. 	High	High	<ul style="list-style-type: none"> Accept / Mitigate: Staffing issues arise due to factors outside of project control. Mitigate where possible – recruit and replace as required. Leverage business area ‘power’ users for training/testing. Work with Implementation Partner to identify additional project resources.
<ul style="list-style-type: none"> Overlapping EAMS and ERP go-lives and competing staff commitment: Both projects will require effort commitments on the part of key city staff to support project activities related to process change, training and go-live activities. 	High	High	<ul style="list-style-type: none"> Accept / Mitigate: Pro-active involvement of EAMS-ERP program staff and business area management to prioritize commitments, and manage through changes with appropriate communication and expectation management. Continuous activity prioritization balancing operations and projects.
<ul style="list-style-type: none"> Complex Integration Environment: EAMS related integrations and a strong dependency on the Workday implementation requires close coordination of activities to align timelines and tasks to reduce duplication and rework. 	High	Medium	<ul style="list-style-type: none"> Mitigate: Participate in cross-functional meetings to discuss sequencing, timing and dependencies of various integrations. Work closely with other project managers to coordinate activities.
<ul style="list-style-type: none"> Business Stakeholder Resourcing: Required for: a) participation in requirements discovery processes, and b) data compilation/preparation/ collection of data required for system import. 	High	High	<ul style="list-style-type: none"> Mitigate: Pro-active involvement of business area management. Identify business-led data collection initiatives. Lessons learned to be applied in subsequent project phases.

Critical Issues	Impact	Response Strategy
<ul style="list-style-type: none"> Additional capital budget funding will be required to fully complete the EAMS implementation project. Original budget was established and approved in 2018. Timeline changes, additions to original scope, resourcing challenges and the introduction of the ERP project have delayed the project and expanded the original project. 	Project will not be completed without additional funding. All work will pause and significant time and effort will be spent to re-establish project plan and acquire knowledgeable resources to resume work should funding be committed.	<ul style="list-style-type: none"> Avoid: determine and define additional funding requirements to complete project past current fiscal year ('23) and submit for approval in 2024 capital budget planning cycle.
<ul style="list-style-type: none"> Timely Decisions and Approvals: The collaborative nature of the City's approach to decision-making could extend program timelines and subsequently budget. Timely approvals are imperative to maintain project progress and momentum 	High	<ul style="list-style-type: none"> Mitigate: Apply decision-making guidelines, as cited in the ESSC Terms of Reference. Apply escalation as risks emerge and as warranted.

Legend: ● R = At Risk

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Program/Project Status Report – Automated Vehicle Locator

Reporting Period: Dec 2022 – Jan 2023

Reported By: Ron Sangle, Fleet Business Improvement Specialist and Paul Swioklo, Manager

Fleet Services, RPF

Health Check				Overall
Scope G	Schedule G	Budget: In-Year G	Budget: Future G	G

Status Update and Plan to Green (if applicable)
<ul style="list-style-type: none"> ELD (Electronic Logging Device) for DVIR (Daily Vehicle Inspection Report) and HOS (Hours of Service) vendor has been selected and pilot testing to commence in February 2023 Implement route optimization for various services is pending a successful pilot.

Project Milestones	Target Date	Expected Completion
Privacy Impact Assessment	02/22	Q1/23
AVL Winter Hardware Installation and Turn by Turn Configuration	02/22	Q4/23
System Integrations	02/22	12/22
Completion of ELD Training (over 280 users)	09/22	Q4/23
Project Governance structure and responsibilities	09/22	Q2/23
Project close	9/22	Q4/23

Budget	
Approved Amount	\$1,858,186.00
Spent to Date	\$ 716,037.50

Project Summary
<ul style="list-style-type: none"> 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
<ul style="list-style-type: none"> Established project governance and procedures through the creation of the Telematics Policy and updated Drivers Handbook Completed Web Focus training for leadership attendees (main application for AVL for vehicle location service and reporting) ELD (Electronic Logging Device) vendor for DVIR (Daily Vehicle Inspection Report) and HOS (Hours of Service) has been selected for pilot testing Completed map updates to Burlington’s Public Facing Portal allowing for accurate tracking of plowed streets and sidewalks Service Desk portal and AVL support email implementation complete and is currently being used to support staff for tickets related to AVL issues Fleet policy has been updated to reflect Telematics Policy

Key Actions Planned for Upcoming Period
<ul style="list-style-type: none"> Rollout communications and publish Telematics Policy, Fleet Policy and Drivers Handbook in OTR ELD vendor selected and pilot testing to commence in February 2023 with select stakeholders Opti path route optimization pilot

Program/Project Status Report – Automated Vehicle Locator

Reporting Period: December 2022 – January 2023

Reported By: Ron Sangle, Fleet Business Improvement Specialist, and Paul Swioklo, Manager Fleet Services, RPF

Critical Risks	Likelihood	Impact	Response Strategy
<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> If/when team members leave, Project Sponsor, Project Manger and Fleet Manager to determine who will take on the role in temporary capacity to cover tasks.
<ul style="list-style-type: none"> No dedicated resource post implementation to manage the AVL system 	High	High	<ul style="list-style-type: none"> 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.

Critical Issues	Impact	Response Strategy
<ul style="list-style-type: none"> Vendor of record initially not able to deliver DVIR and HOS application and therefore has delayed implementation. 	9 months	Procurement for new vendor has been initiated. Activities will continue to follow current paper process.

Program/Project Status Report – Non-Union Job Evaluation

Reported By: Laura Boyd, Executive Director, Laura Atanas, Manager, Total Compensation & Data Analytics and Marylisa Forsyth, HR Representative

Reporting Period: Dec 2022 – Jan 2023

Project Summary
<ul style="list-style-type: none"> 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 pay structure and compensation philosophy (3) repository of fully evaluated non-union job questionnaires with consistent application of job titles and (4) pay equity review of the results

Key Achievements in Reporting Period
<ul style="list-style-type: none"> Completion rating of 98% of all positions utilizing the new Job Evaluation rating system Job Evaluation Rating Committee have reviewed ratings to ensure accuracy of the rating process New grade structure has been developed Mapping analysis and recommendation for implementation to inform budget has been completed Completed Preliminary hierarchy review of jobs in new structure with Directors and Executive Directors. Introduced JE moratorium (pause) on all net new job evaluation activity for non-union positions Met individually with Council members to review project goals and clarify questions. Project implementation cost supported by SRT and BLT, line item added to the 2023 budget.

Key Actions Planned for Upcoming Period
<ul style="list-style-type: none"> JE Project team reviewing and analyzing feedback from preliminary hierarchy meetings with EDs and Directors. Adjusting JE ratings based on validation checks and anomalies. Begin to prepare JE communication plan, phased approach, sharing project updates with leaders and staff Pay Equity review to be completed by external consultant - Gallagher Analyze non-union people placement in new structure. Identify compression, internal equity, red circle cases. Job Title/Nomenclature review continuation Continue to review and propose revisions to compensation policies, guidelines and practices. Continue to liaise with Workday implementation team

Health Check				Overall
Scope G	Schedule G	Budget: In-Year G	Budget: Future G	G

Status Update and Plan to Green (if applicable)
<ul style="list-style-type: none"> Project Timelines – Final timelines and implementation are dependent on budget and Council approval Strong correlation with Workday project implementation and launch

Project Milestones	Target Date	Expected Completion
Develop modernized Job Evaluation Plan	Q1 2021	completed
Design, train & complete Job Information Questionnaires (JIQ)	Q2 2021	completed
JIQs approved by two levels of supervisor	Q4 2021	completed
Ratings Assigned	Q2 2022	98% completed
Jobs placed in new salary structure and recommend new titles	Q1 2023	On track
Update Compensation Policies	Q2 2023	Revised and On track
Communicate JE Results	Q2 2023	On track
Up-to date repository of JIQ's	Q3 2023	Revised and On track

Budget	
Approved Amount	\$180,000 for consultant services
Spent to Date	\$160,000

Program/Project Status Report – Non-Union Job Evaluation

Reported By: Laura Boyd, Executive Director, Human Resources, Laura Atanas, Manager, Total Compensation & Data Analytics and Marylisa Forsyth, HR Representative

Reporting Period: December 2022 – January 2023

Critical Risks	Likelihood	Impact	Response Strategy
<ul style="list-style-type: none"> Project timeline may be impacted based on: <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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
<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Mitigate: Change management plan including a clear communicate plan and regular updates on 360
<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Mitigate: A change management plan that is focused on reduction of change resistance has been developed, Next quarter the project team will finalized the communications for People Leaders as a follow up from the Job Evaluation Roadshows
<ul style="list-style-type: none"> Incomplete, out of date and poor quality JIQs submitted or approved by departments 	High	Medium	<ul style="list-style-type: none"> 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
<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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.
<ul style="list-style-type: none"> Staffing of Project: Project is being completed off the side of a Human Resources employee's desk. Employee is on contract until June 2023 	High	High	<ul style="list-style-type: none"> Mitigate: May need to consider an additional contract for 2023 to finish off the key components of the project.
Critical Issues	Impact	Response Strategy	

Legend: ● R = At Risk

● Y = Warning

● G = On Track

Program/Project Status Report – Property Tax Software Program

Reported By: Maxine Rukundo, Project Manager;
Ann Marie Coulson, Project Champion

Reporting Period: Dec 2022 – Jan 2023

Health Check				Overall
Scope G	Schedule G	Budget: In-Year G	Budget: Future G	G

Status Update and Plan to Green (if applicable)
<ul style="list-style-type: none"> Concurrently progressing through Milestone 2 and 3 (of 4) with continuation of data validation, solution configuration and integration development. Project team has commenced orienting the broader tax team on the new system. 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	06/2022	02/2023
Configuration & Integration	11/2022	04/2023
Final Data Conversions	01/2023	07/2023
Testing and Training	01/2023	08/2023
Deployment and Project Close	03/2023	12/2023

Budget	
Approved Amount	\$1,500,000
Spent to Date	\$533,346

Project Summary
<ul style="list-style-type: none"> Implementation of the CentralSquare property tax software solution (CS). <ul style="list-style-type: none"> 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
<ul style="list-style-type: none"> Validation of the configuration continues Iterative system development (including integrations) End user workflow orientation is underway PIA Draft Report received and under review by staff

Key Actions Planned for Upcoming Period
<ul style="list-style-type: none"> Conclude and obtain sign-off on the Privacy Impact Assessment (PIA) Complete and sign-off on final component of Milestone 1 (Business Process and configuration document) Complete review of business monthly processes Finalize the Fit Gap Analysis report Finalize user-training plan Continue design & configuration (including integrations)

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

Program/Project Status Report – Property Tax Software Program

Reported By: Maxine Rukundo, Project Manager;
Ann Marie Coulson, Project Champion

Reporting Period: Dec 2022 – Jan 2023

Critical Risks	Likelihood	Impact	Response Strategy
<ul style="list-style-type: none"> IT resource availability: Several projects and initiatives are underway that may impact availability of IT resources to support the integrations configuration, for example: ERP, CRM, EAMS all of which tap into the IT resources at the city. 	Medium	Low	<ul style="list-style-type: none"> Risk Mitigation: Collaborative efforts across project teams are underway to adjust project schedules and resource plans to ensure availability of required resources. Continue to maximize use of the vendor resources available to us.
<ul style="list-style-type: none"> Vendor experience: 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. 	Low	Medium	<ul style="list-style-type: none"> Risk Mitigation: For this software the City only requires a subset of people records and property records to be synced between the two systems. CS has gathered significant information from working in tandem with multiple municipalities to develop Amanda workflows and use cases that will support the configuration of this integration.
<ul style="list-style-type: none"> Vendor Bandwidth: CS' development environment currently has low bandwidth which negatively impacts functionality review and user confidence in the replacement system. 	Medium	Medium	<ul style="list-style-type: none"> CS is aware of the issue and has committed resources to resolve the problem. CS has provided guidance around which processes hog system resources in order to reduce the negative impact on the team as they progress through review of key businesses processes.

Critical Issues	Impact	Response Strategy
<ul style="list-style-type: none"> N/A 		

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