Overview of Project Governance and Status
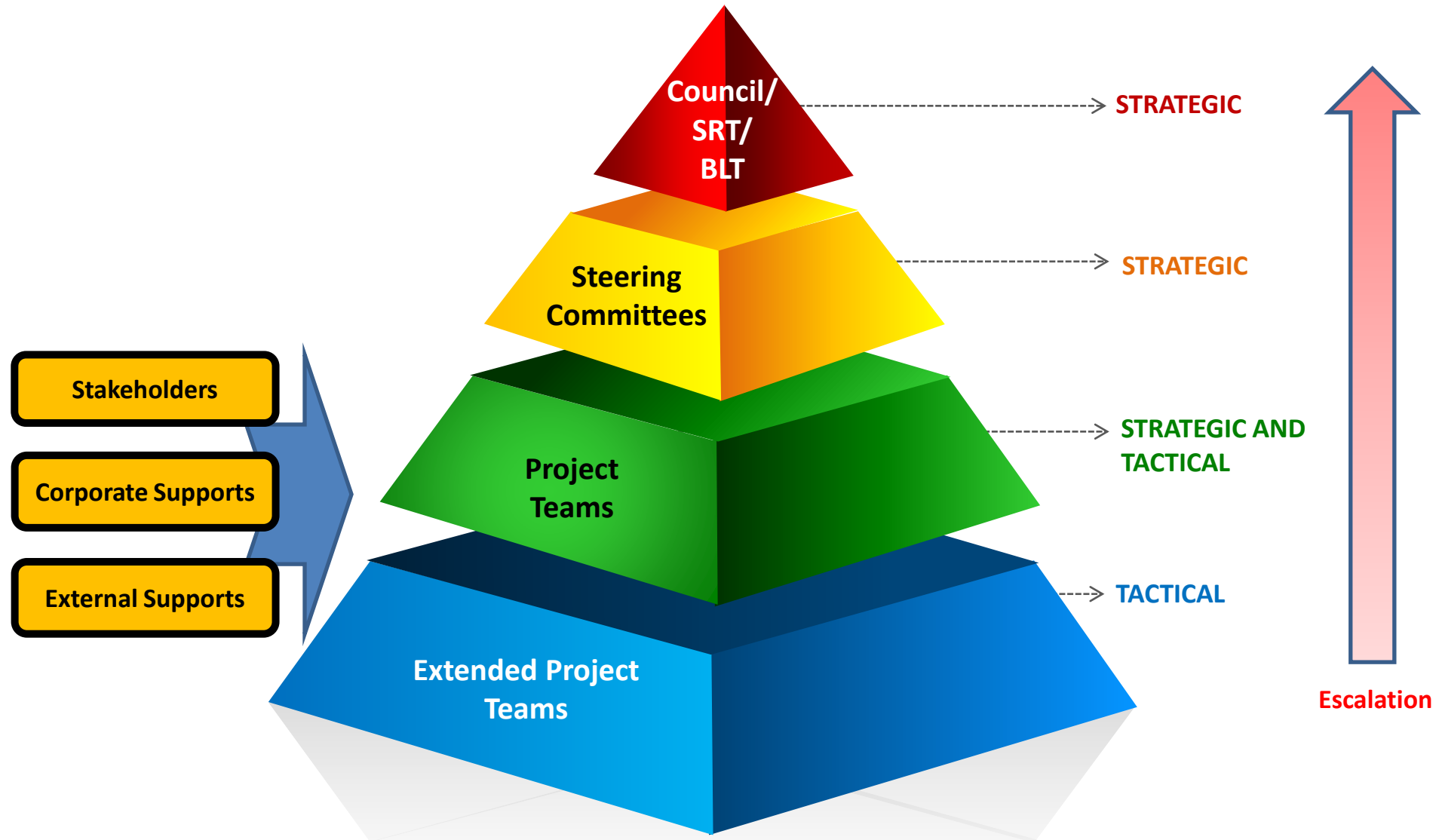
- Project governance framework
- Project risk management
- Status of EAMS, ERP, CRM and BI
    - Scope
    - Key achievements
    - Key Actions
    - Critical risks and challenges
- What's Next

Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation

Strategic investment in digital capability

Senior level commitment, accountability, regular reporting and risk management

Leverage capabilities for data sharing, process integration and workflow across multiple systems

Corporate Project Governance

Customer Facing Tools
- Web/Digital Tools
- CRM

Integration and Analytics
- Search/Discover
- Integration Tools
- Data Standards
- BI

Applications

Enterprise Systems
- ERP
- EAMS
- Other Enterprise Systems

Expert Systems

Business Online Applications

Infrastructure

Security

Project Governance Framework

Project Governance Defined

Governance Element	ERP	EAMS	CRM	BI
Steering Committees (Strategic)	• Enterprise Software Steering Committee	• Enterprise Software Steering Committee	• Customer Experience Steering Committee	• Information Governance Committee
Project Teams (Strategic and Tactical)	• ERP Program Team (includes ERP Service Leads) • CIO, Executive Director of Human Resources, Executive Director of Finance, Program Mgr on strategic implementation • ITS Sub-Team	• EAMS Project Core Team • CIO, Director of RPF and Project Manager on strategic implementation • EAMS Asset Leads Advisory Committee • ITS Sub-Team	• CRM Project Team • Customer Experience Working Group • ITS Sub-team	• BI Program Team • CIO and Program Mgr on strategic implementation • 3 contract roles on tactical implementation
Extended Project Teams (Tactical)	• ERP Advisory Team • Further sub-teams to be established as program progresses (e.g., change management, training, testing, quality assurance, etc.)	• EAMS Project Coordination Team • Asset Maintenance Sub-Teams • Asset Planning Sub-Teams • Procurement Negotiation Team • Application Analysts • Timesheet/Payroll Feed Team • EAMS Data Quality Team	• Department Implementation Teams • Change management and communication team • Web Implementation Team	• Database Administrator • Application Analyst GIS • Various Analyst positions within services, i.e. Finance, Transit, Transportation

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Project Risk Management

Plan Risk Management

1. Risk Management Plan

Plan Risk Response

Identify Risk

Assess Risk

2. Project Risk Log

Monitor and Control Risks

"All projects are risky since they are unique undertakings…They do this in a context of constraints and assumptions, while responding to stakeholder expectations that may be conflicting and changing. Organizations should choose to take project risk in a controlled and intentional manner in order to create value while balancing risk and reward." --PMBOK Sixth Edition

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Project Status Report – [project name]

Project Summary and Strategic Alignment

- [List project objectives and alignment with V2F, IT and other strategic plans]

Key achievements in last reporting period

- [Detail the key achievements in the last period]

Key actions planned for upcoming period

- [Detail the key actions planned for the next period of work]

Critical Risks and Issues

- [Detail key risks and issues]

Stakeholder Engagement & Communication

- [Key discussion areas]

Overall Status: G

Status change:
[Detail any changes]

Project Timeline (Milestones)	Target date	Expected completion	Status G
	mm/yy	mm/yy	On Track
	mm/yy	mm/yy	At Risk
	mm/yy	mm/yy	
	mm/yy	mm/yy	
	mm/yy	mm/yy	

Budget Update G

- [Any key budget changes or issues]

Scope Update G

- [Key discussion areas]

Resource Update G

- [Key discussion areas]

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

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Project Status Report – [project name]

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 FTE.	The project is under resourced by 5 TE.
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 - Additional Notes

This section would be used to provide any details related to the project status and/or the headings included on page 1.

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Project Status Report – CRM

Project Summary and Strategic Alignment

Implementation of a Customer Relationship Management (CRM) system and Knowledge Base is a key initiative to achieving top priorities and goals within the V2F Strategic Plan, *Focus Area 5 - Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation.*

Key achievements in last reporting period

- Current state business process reviews for in-scope Departments
- Delivery of external consulting report from AtFocus Inc. to assess options for strategic refocusing of CRM project following strategic pause
- Update of Project Charter to support AtFocus report recommendations
- New governance model
- Addressed 2 Project Audit items

Key actions planned for upcoming period

- Vendor migration of system to Azure Cloud Services
- Department engagement to build CRM project plan, start Phase 1 rollout
- Change Management Plan, Risk Management Plan
- Remaining Audit requirements completed
- Sandbox build for CRM web upgrade testing

Critical Risks and Issues

1. COVID-19 - Risk to staff/teams' availability, engagement, customer service
2. BUDGET - Additional project funding required for full deployment
3. STAFFING FRAMEWORK – Planning for additional staff required to support Service Burlington deployment (Phase 2)

Stakeholder Engagement & Communication

- Communication to COB staff regarding "Transitional" deployment model
- Engagement with 5 departments to plan and deliver Phase 1 rollout
- Continued engagement & training of "operationalized" departments

Overall Status: (R)

Status change:
At Risk since strategic pause November 2019. Review of scope and budget required for full COB rollout and long term Customer Experience goals.

Project Timeline (Milestones)	Target date	Expected completion	Status (R)
Project Management Plan	07/2020	07/2020	Green
Phase 1 CRM within Departments	02/2021	02/2021	Yellow
Phase 2A CRM Service Burlington	12/2021	12/2021	Yellow
Phase 2B CRM for Rec Services TBD	mm/yyyy	mm/yyyy	Red
One City Phone # TBD	mm/yyyy	mm/yyyy	Yellow

Budget Update (R)

- $2,011,075 Budget approved will account for Project Team and limited deployment to 4 departments. $910,000 expended to Dec/19.
- Limited budget for system integrations, licensing, remaining departments, operations

Scope Update (R)

- Limited scope will impact efficacy of solution including integrations, reporting
- Current scope is for 4 departments only
- Web upgrades and online forms require corporate direction

Resource Update (Y)

- Project Team staffed, Operations team will require growth
- Department staff required for planning and deployment activities

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

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Program Status Report – Enterprise Resource Planning (ERP) Program

Reporting Period: Jan-Apr 2020
Reported By: Tracie Legg, Sr Program Mgr

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.
- Aligned to Vision to Focus (Focus Area 5) and the corporate IT Strategy

Key achievements in last reporting period

- Completed Stage 3 of software RFP process
- Shortlisted Proponents and prepared agenda and scripts for Stage 4 detailed demonstrations
- Steering Committee approval of risk management plan process
- Completed recruitment for 2 Interns who will assist in user experience mapping, process portfolio, and communication plan (June 1 start date)

Key actions planned for upcoming period

- Stage 4 detailed demonstrations, which will result in the selection of Negotiations Proponent(s)
- Negotiations with software Proponent(s)
- Recruitment of Data/Information and Project Manager positions
- Program planning: Risk management plan, draft change management plan, communications plan, draft Implementation Services RFP

Critical Risks and Issues

- Staff capacity: Heavy reliance on staff in HR, Finance, and ITS who are also managing daily operations.
- Timelines: Detailed demonstration results may impact process and time allotted for Negotiations (e.g., One Proponent vs. multiple Proponents). This may also impact existing applications that are nearing end-of-life.

Stakeholder Engagement & Communication

- 60-70 staff across all departments will attend and provide feedback on detailed demonstrations and may be involved in user experience and business process mapping
- Communication plan will identify future activities

Overall Status: (Y)

Status change:
Timelines extended to accommodate additional Proponents moving to Stage 4 and impact of COVID on key staff involved in the Program.

Project Timeline (Milestones)	Target date	Expected completion	Status (Y)
Software RFP contract awarded	09/2020	12/2020	Yellow
Implementation services contract awarded	12/2020	03/2021	Yellow
Implementation commences	01/2021	04/2021	Yellow
Go-live	01/2022	01/2022	Yellow
Transition to operations	04/2022	04/2022	Yellow

Budget Update (G)

- Total Program budget: $9,480,000
  - Actual spent to 04/2020: $403,885
  - Commitments over and above Actuals: $49,500

Scope Update (G)

- No change in scope

Resource Update (G)

- In the process of recruiting for Data/Information position and Project Manager
- Goal is to have all dedicated staff hired within 3 months of "Implementation commences" timeline.

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

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

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 last reporting period

- Established EAMS Negotiation Team and commenced negotiations with Proponent, involving legal review of agreements and statements of work
- Planned the role and responsibility of EAMS Core Team members
- Completed Data Quality Assessment procurement and launched project
- Revised EAMS project governance structure

Key actions planned for upcoming period

- Award contract to Proponent
- Recruit 3 EAMS Core Team member positions
- Develop detailed project plan
- Complete Data Quality Assessment

Critical Risks and Issues

- Staff capacity: unavailable staff resources as a result of competing priorities and/or staff identified as essential workers
- Potential issues arising out of current EAMS negotiation process

Stakeholder Engagement & Communication

- Enterprise Software Steering Committee: informed of project status; endorsed revision to governance structure and team roles
- EAMS Advisory Committee: Engaged in review of relevant portions of the contract
- Key Stakeholders: Significantly engaged in Data Quality Assessment workshops

Overall Status: Y

Status change: Timelines extended to accommodate additional work required to conclude negotiations and finalize agreements and impact of COVID on key staff involved in the Project.

Project Timeline (Milestones)	Target date	Expected completion	Status
Software and implementation services contract awarded	05/20	08/20	Y
Data Quality Assessment Complete	07/20	07/20	G
Project Plan	09/20	09/20	G
Timesheets/Payroll Feed Complete	11/20	11/20	G

Budget Update

- Total Project budget: $2,721,300. Funds remaining: $2,675,100

G

Scope Update G

- No change in scope

Resource Update Y

- New job description developed for Business Specialist – Asset Planning and Business Specialist – Asset Maintenance.
- Change Management position on hold pending completion of PROSCI consulting engagement and recommendations to Burlington.

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

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Program Status Report – Business Intelligence (BI) Program

Project Summary and Strategic Alignment

- Business Intelligence is a combination of skills, technology and strategy that transforms data into high quality information for use in great decision-making. Data is typically presented through dashboard tools.
- Aligned to Vision to Focus (Focus Area 5) and the Corporate IT Strategy, "Managing Information as an Asset"

Key achievements in last reporting period

- Developed & presented Vision to Focus integrated reporting tool to BLT
- Developed data-driven dashboard to support IT re: COVID-19 related impacts – working from home, remote access, collaboration, security
- Initial testing and feedback for Capital Budget reporting
- First round of corporate training complete, 8 courses and 27 individuals
- Master Data Management Roadmap launched

Key actions planned for upcoming period

- Participating in Community Risk and Vulnerability Branch, Situational Awareness Division to support the ECG with data-driven dashboards
- Business Objects functional replacement
- Business view development for CRM and Customer Experience
- Capital Budget and HR Recruitment reporting tools

Critical Risks and Issues

- Unavailable Staff Resources from stakeholder services, due to multiple priorities impacting staff capacity
- Poor Source Data Quality or absent data, from ineffective business processes or low level of understanding within the organization for how to best structure data, establish and implement data quality rules.

Stakeholder Engagement & Communication

- 32 people attended Phase 2 Close and Launch event
- BLT presentations and discussions Feb 12 and April 15
- One on one meetings with Councillors through February and March

Overall Status: G

Status change:

Changed from Yellow to Green following initiation of the Master Data Management Roadmap and progress in this area.

Project Timeline (Milestones)	Target date	Expected completion	Status G
Phase 3 Launch	01/20	01/20	Green
Corporate Training Launch	01/20	10/20	Green
V2F Integrated Reporting to Cttee	05/20	05/20	Green
Data-Driven Dashboard to ECG	05/20	05/20	Green
Business Objects Replacement	09/20	09/20	Green

Budget Update G

- Total Program budget: $2,856,256
- As of March 31 2020, the program is projecting a year-end balance of $90,832 remaining in Capital Order CA0057.

Scope Update G

- In response to COVID-19 impacts, creation of a new dashboard to support IT Services and development of a dashboard to support the Emergency Control Group were added to scope, and accommodated with existing staff resources on the BI program team

Resource Update G

- Data Integration Specialist contract extended from original end date of May 2020 to new end date at program close in December 2020
- Business Analyst partial allocation to assist the BI program has been a great benefit

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

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What's Next…

- 2021 Budget decisions:
  - CRM
  - BI
- Report in the fall focusing on change management
- Next status reports – October