UNITE PROJECTS UPDATE
COMMITTEE OF THE WHOLE

DECEMBER 2020

AGENDA

1. Recap of UNITE Program
2. Highlights 2020/2021 projects
   - Payroll Modernization
   - CRM Phase II
   - Planning and Development Modernization
   - Bellamy Retirement
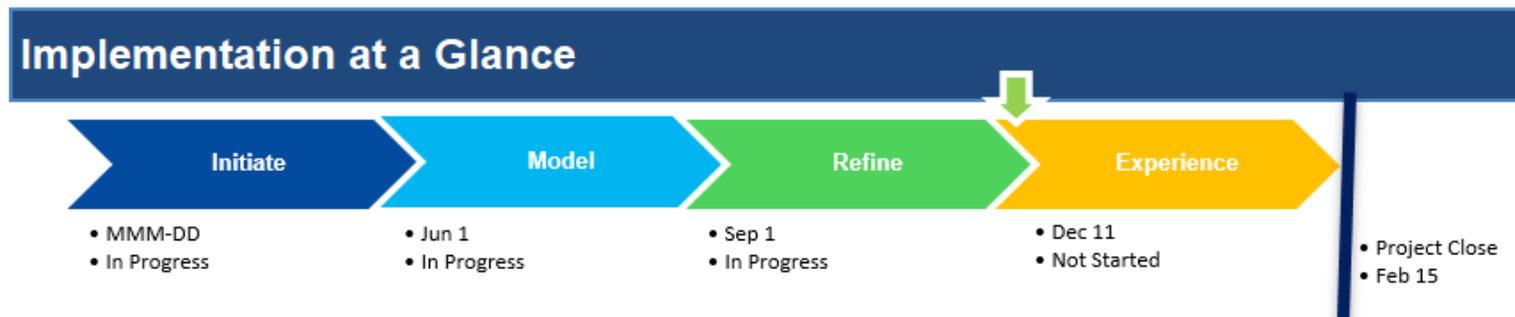3. Conclusions

1.0 BUSINESS DRIVERS AND ROADMAP

	2019 Q1-Q2	2019 Q3-Q4	2020 Q1-Q2	2020 Q3-Q4	2021	2022	2023
1. Payroll Modernization and Talent Management: Evaluate and implement, a payroll, staff scheduling and talent management (HCM) solution.		Planning	Execute	Execute			
2. CRM Streamlining: Improve the usability of Dynamics CRM for Customer Service area and related stakeholders.		Execute					
3. Dynamics 365 F&O Enhancements: List of sub-projects includes: (1) fix project accounting; (2) streamline procurement and; (3) implement budgeting/grants and; (4) review VeMax integration.		Planning / Projects	Planning / Procurement	Planning / Budgeting	Planning / VeMax		
4. Office 365 Roll-Out: Migrate to O365. Targeting email and teams and reviewing other opportunities.			Planning	Execute			
5. CRM Phase II - One Parkland Portal: Extend internal rollout and implement Citizen portal for on-line inquiries and reporting issues.				Planning	Execute		
6. Bellamy Retirement: Evaluate utility billing/AR/Property Tax/Cashering.				Planning	Execute	Execute	
7. Planning and Development Modernization: Evaluate alternatives and select a preferred option.					Planning	Execute	
8. Records Management: Staff training, creating tools, implementation, FOIP backup. Focus areas: Ag, Smart Parkland, Community Sustainability (bio reports, ESAs), cemeteries, community grants, OH&S and TRIM .						Planning	Execute
9. CRM Phase III Portal Update: Placeholder to enhance the portal with other Services.						Planning	Execute

2.0 PAYROLL MODERNIZATION

This project focuses on removing manual processes and streamlining the payroll function.

- Started parallel testing (comparing pay registers) between Bellamy and Ceridian in early November and scheduled for completion by Dec 11th.

- The robust testing has resulted in finding 50 configuration issues – of which the majority have been resolved – 1 critical OT issue remains..

- Executing a detailed training and communication plan with all impacted users. Go-live Jan 1/21.

## Implementation at a Glance

Initiate	Model	Refine	Experience
• MMM-DD • In Progress	• Jun 1 • In Progress	• Sep 1 • In Progress	• Dec 11 • Not Started

• Project Close
• Feb 15

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2.0 CRM PHASE II

Project timelines are May – Aug 2020 – extended to Dec 2020. The goal is to streamline processes and reduce manual processes.

- Offering **more** online services to residents in this phase
- Accessible from a smartphone and auto-feeds the Customer Services CRM system.
- Target to get this project completed by end-of-year
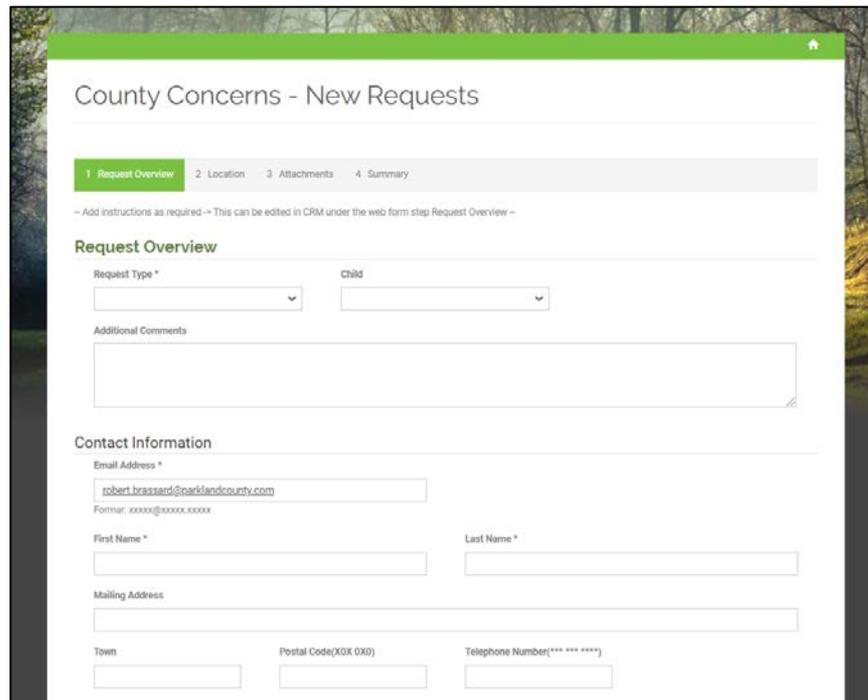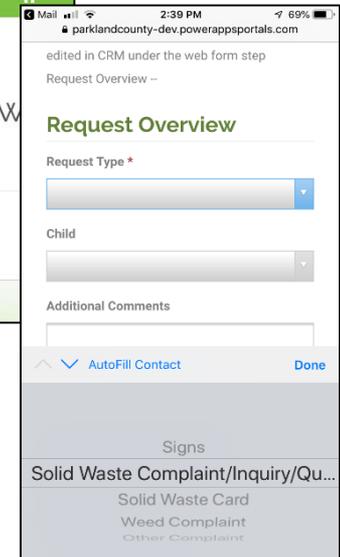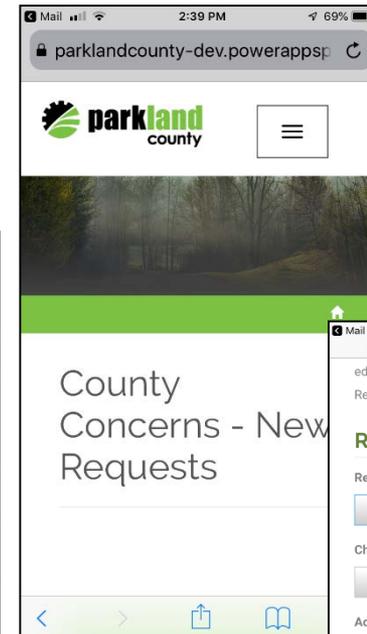
Scope:

- Agriculture (Complaints process)
- Land Management inventory
- PW – Solid waste card + Vemax WRR tickets replaced with CRM (Sept 30)

2.0 PLANNING AND DEVELOPMENT MODERNIZATION

Project timelines are January 2021 – November 2021. The goal is to streamline processes and reduce manual processes.

Background:

- More than 3,000 applications and permits are processed annually and are mostly mandated through regulation or guided by legislation.

- A large number of these transactions are completed in person. In order to provide more predictable and consistent service, adopting an end-to-end service delivery approach that simplifies customer interactions and optimizes operations between the various departments a modern system is essential.

- Current processes and systems consist of Excel, email and shared drives. RFP expected to be released in January 2021.

Scope:

- Subdivision and Development application referrals to internal departments including digital drawing review.

- Building, Electrical, Plumbing, Gas and Private Sewage Permits, Inspections, Compliance Monitoring, File Searches, Safety Codes Enforcement

- Online Permits & Inspections, Electronic Plans Reviews, Mobile Access, Web Portal and GIS Integration

2.0 BELLAMY RETIREMENT

Project timelines are January 2021 – November 2021. The goal is to fully retire this 27-year-old AS400 system with modern processes, online capabilities and reporting.

Background:

- HR/Payroll has been migrated off Bellamy in 2020, however, tax, cashering and utilities need to be migrated to modern systems in order to retire this asset at end –of-service..

- Stage one of replacing this legacy system is to undertake an RFP/RFI to determine feasible options, source and then implement in 2021.

Scope:

- Subdivision and Development application referrals to internal departments including digital drawing review.

- Building, Electrical, Plumbing, Gas and Private Sewage Permits, Inspections, Compliance Monitoring, File Searches, Safety Codes Enforcement

- Online Permits & Inspections, Electronic Plans Reviews, Mobile Access, Web Portal and GIS Integration

2.0 PERFORMANCE MEASURES AND OUTCOMES

Project Name	Linkage to Strategic Pillars	Key Sponsor Stakeholder	Primary Benefit to Residents	Progress
Pay AX	**Pillar 4**: Responsible Leadership	Corporate Services	Converge aging finance system into a modern platform for improved reporting and less manual data entry. This work can be characterized as "foundational".	Completed
Dynamics 2012 Upgrade to D365	**Pillar 3**: Respected Environment	Finance	Upgrade to new version of software for a stable finance platform and increased process efficiencies. This work can be characterized as "foundational".	Completed
D365 CRM	**Pillar 1**: Complete Communities	Corporate Services	Introduced formal tracking of resident requests and automated manual processes.	Completed
D365 CRM Phase II	**Pillar 1**: Complete Communities **Pillar 3**: Respected Environment	Corporate Services	Introduced new on-line services for residents instead of going to the county offices.	In Progress
Project Management Improvements	**Pillar 4**: Responsible Leadership	Engineering Services	Improved financial controls and monitoring of project budgets, as well as, a reduction of manual reporting with a projected savings of $38k/yr.	Completed
Payroll	**Pillar 4**: Responsible Leadership	Executive Admin	Projected savings of 1500 hours per year in operating costs.	In Progress
Core HR Performance Mgt	**Pillar 4**: Responsible Leadership	Executive Admin	Reduction of manual processes. Projected savings of 400 hours per year.	In Progress
Bellamy retirement	**Pillar 4**: Responsible Leadership	Finance	Reduced operating costs and elimination of manual processes (Stage II of the project). Reduction of $176k in legacy software licensing in 2022.	Planning Phase
Planning and Development	**Pillar 1**: Complete Communities **Pillar 2**: Economic Diversification **Pillar 3**: Respected Environment **Pillar 4**: Responsible Leadership	Planning and Development	Introduces new on-line services for residents allowing residents to submit applications and payment for planning and development services via the web instead of in-person. Timelines for processing applications is projected to be reduced by 15 to 20% from today's baseline.	Planning Phase

Complete Communities: Residents apply remotely without coming into the office.
Respected Environment: Moving away from paper to a paperless system.
Responsible Leadership: Data/file integrity with fewer opportunities for human error.

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3. CONCLUSIONS

- The UNITE program remains tracking **on plan** for 2020 and initiating key steps for the 2021 program..

- Governance and oversight of the UNITE projects remains high.

- Vendors being actively managed; no significant issues to report at this time.

- Starting to plan 2021 UNITE projects such as retiring Bellamy ERP and implementing a modern Planning and Development system with on-line services.

- Parkland County is featured on the Microsoft website for the use of its technology on improving County business processes:

    - https://customers.microsoft.com/en-us/story/823693-parkland-county-dynamics365-government-canada?preview=1