



UNITE PROJECTS UPDATE



FEBRUARY 26, 2019

AGENDA

1. Background and Business Drivers
2. Alignment to Strategy
3. Approach and Roadmap
4. Update on 2019 projects
5. Long Term Impact
6. Conclusions

1.0 BACKGROUND AND BUSINESS DRIVERS

There is an opportunity to improve business efficiencies and advance the County's Strategic Pillars:

- Some systems at Parkland County are approaching end of life and must be replaced and some are not meeting business needs. This includes systems such as the payroll (AS/400) – implemented 27 years ago.
- Many business processes are manual creating ineffective work processes such as those in Development Services: Currently, the division uses systems from the Alberta Safety Code Council and a myriad of excel spreadsheets to manage development permits and other planning activities.
- Citizen Engagement and on-line services are under developed. Currently, on-line services available from Parkland County are limited. Projects have been identified to modernize and extend these services.

1.0 BACKGROUND AND BUSINESS DRIVERS

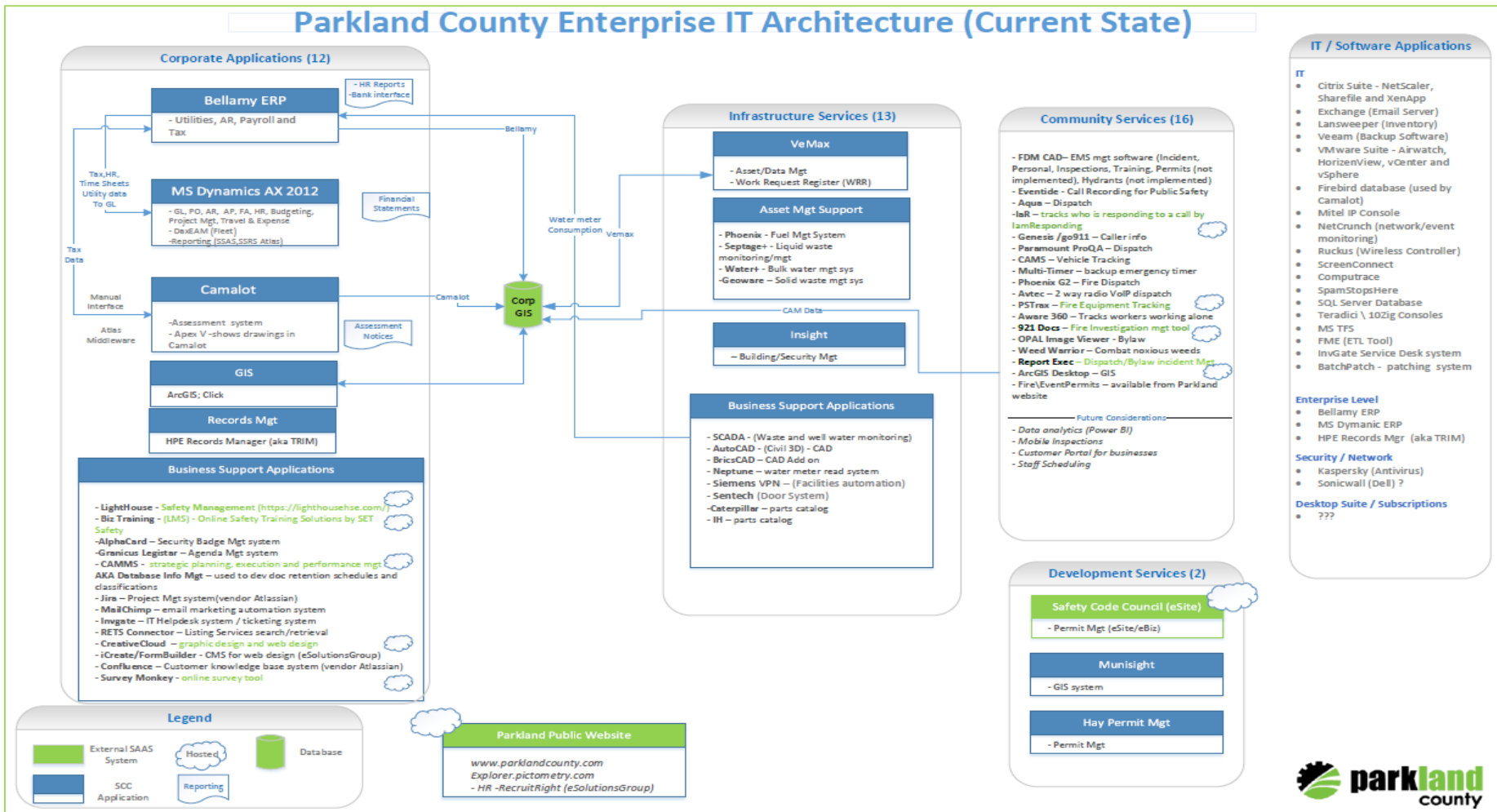
In 2018, Management undertook a comprehensive review of business technology issues and opportunities that impact both business efficiency and strategy execution.

Num	Division	Additional Interviewee's
1a	GM Corporate Services Group Ken Van Buul (March 7, 2018)	*Tom Watts (Director HR) *Alan Desisle (Director Legal) *Sarah Mate (Director Comms) *Laura Swain (Director Strategic Planning and Interg. Affairs)
<p>The primary feedback from the group meeting is as follows:</p> <ul style="list-style-type: none"> *Upgrading to Dynamics 365 and then replacing the Bellamy system appears to be highest priority. The system requires significant manual processes regarding the payroll. The system also appears to lack workflows and integration into other system. Parkland. The key functions of the system include utility billing, AR, payroll, benefits entry. A review of replacement systems should be conducted in Q2-Q3/18. *HR is in the process of implementing additional systems for HR/Performance Manager. They will be implementing "Encompassing Visions". This will address additional HR needs more comprehensive HR systems. *There is a need for a customer relationship management system (CRM) to allow Parkland staff to track citizen requests, as well as, track internal requests for corporate services; currently there is no tracking capabilities. There was some discussion that the TaxGate ticket tracking system used by Corporate IT could be re-used by other corporate services area to intake process service requests. A review of systems should be conducted in Q2-Q3/18. *The group utilizes the CAMMS system for strategic planning tasks. The system enables the development of integrated, systems-driven approach to strategic planning, execution and performance management. This system does not allow for integrated budgeting and thus impacts the timeliness of the creating the annual budget. A review of a corporate budgeting system should be conducted in Q2-Q3/18. *Feedback indicated that Dynamics AX/ERP requires additional utilization. Current functions that appear to not be fully utilized across the organization include: Procurement and the Projects modules. *Staff feel that additional Dynamics AX training is required. In addition, business reports from AX would be helpful. 		
Num	Division	Additional Interviewee's
2a	CFO Group Tracy Kibblewhite (March 19, 2018)	*Darvin Evans (Lead Assessment) *Teri Stewart (Dir Reporting) *Mike Ficht (Dir Finance) *Michelle Schumacher (Mar. Finance) *Darvin Evans (Lead Assessment)
<p>The primary feedback from the group meeting is as follows:</p> <ul style="list-style-type: none"> *Overall, Dynamic AX is working well for financial needs but some further improvements can be made. *The highest priority for system changes include: (1) replacing payroll system in Bellamy and (2) replacing Bellamy. *Future improvements should include allowing time entry in the field from mobile devices and smart phones. *Future improvements should include allowing more for assessment data to be accessible in the field. *Project information should be updated to be daily from the current weekly/monthly process. *Better synchronized between Bellamy and Camala is required- integration is needed to ensure data like zoning type is synchronized regularly. 		
3a	GM Development Services Group Peter Vano (March 6, 2018)	*Carol Bergum (Director Planning) *Mark Edwards (Director Econ Dev) *Krista Quesset (Mar. Commun. Sustainability)
<p>Overall, team felt that the current business systems were not meeting their business needs due to the following reasons:</p> <ul style="list-style-type: none"> *Many of the planning and development processes are manual. *The information is currently stored in different systems, spreadsheets and in paper records thereby making it difficult to collaborate between departments. *There is a severe data management issues as data is stored in spreadsheets and stand-alone systems (e.g., contaminated sites). Some business processes are still paper-based. *There is a capability gap with respect to on-line services for citizens. *There is not one-view of seeing a citizen's historical and active files across departments -- no CRM capability. 		

1.0 BACKGROUND AND BUSINESS DRIVERS

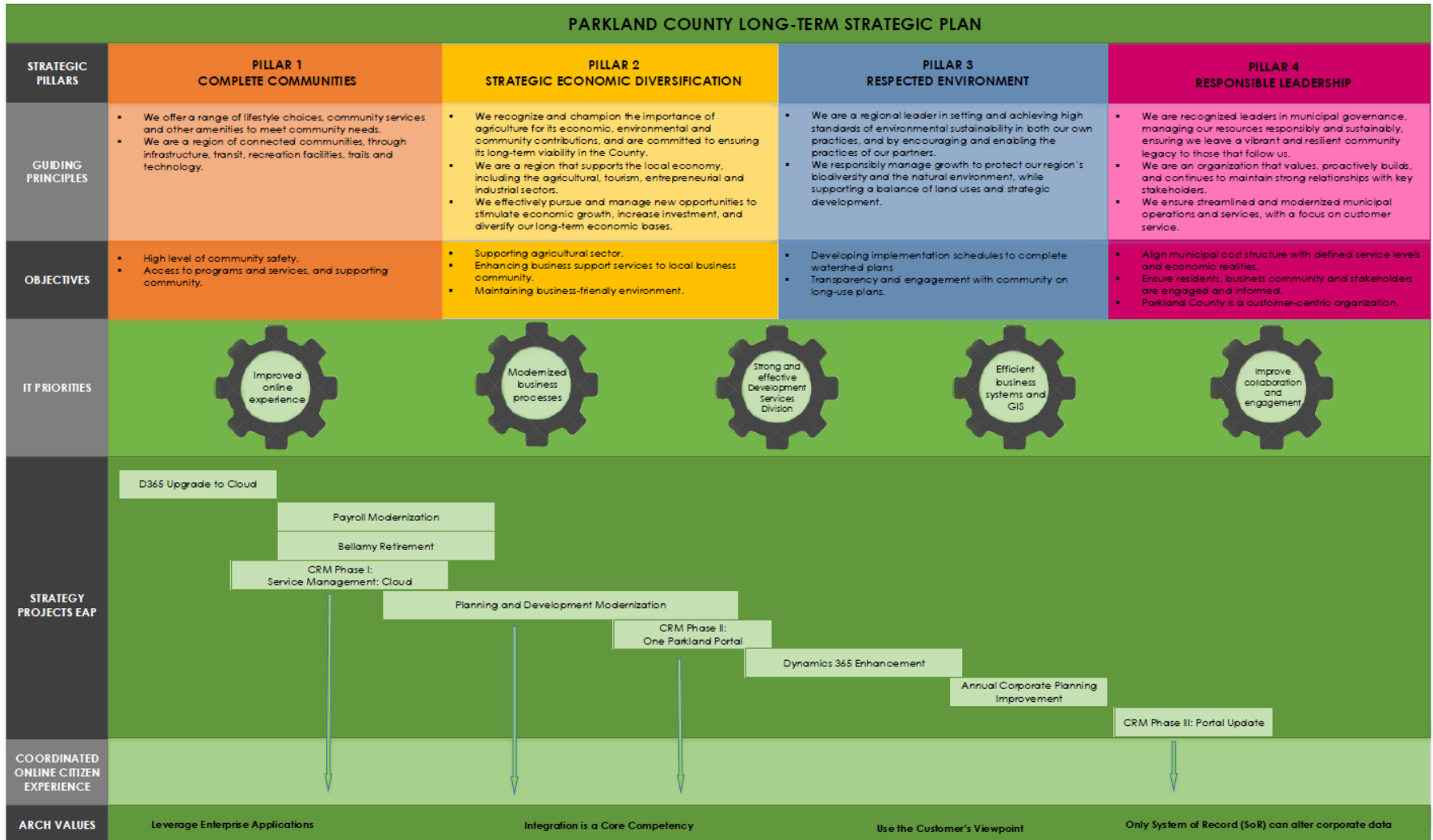
The inventory of systems revealed information silos and extensive use of manual processes -- both impacting integrated work processes across departments.

Parkland County Enterprise IT Architecture (Current State)



2.0 ALIGNMENT TO STRATEGY

- Several opportunities emerged that would advance the County's Strategic Pillars.



3.0 APPROACH AND ROADMAP

- Devised a roadmap that would allow for effective execution



	2018 – 2019				2020 - 2022		
	2018 Q1-Q2	2018 Q3-Q4	2019 Q1-Q2	2019 Q3-Q4	2020	2021	2022
1. D365 Upgrade to Cloud: Issue an RFP for services to migrate from Dynamics 2012 to D365 (June/18). Then migrate to D365 Aug 1 - November 2018 (like to like features/no material enhancements; CFO Leads.	Planning	Execute	Execute				
2. Payroll Modernization: Evaluate alternatives and select a preferred option. Implement recommendation; Also Implement a staff scheduling solution. Note further analysis required – could be part of project CFO/HR.			Planning	Execute			
3. Bellamy Retirement: Evaluate utility billing/AR/Property Tax/Cashiering alternatives and select a preferred option. Implement recommendation; CFO Leads.					Planning & Execute		
4. CRM Phase I (Service Management; Cloud): Evaluate alternatives and select a preferred option. Implement recommendation; Strategic Planning and Intergovernmental Affairs Leads.	Planning	Planning	Execute				
5. Planning and Development Modernization: Evaluate alternatives and select a preferred option. ; Development Services Leads.	Planning	Planning	Planning	Execute	Execute	Execute	
6. CRM Phase II - One Parkland Portal: Evaluate alternatives and select a preferred option. Implement recommendation including integration into ERP and Planning and Development system; Strategic Planning and Intergovernmental Affairs Leads.				Planning	Execute		
7. Dynamics 365 Enhancement: Review and tune existing; CFO Leads.				Planning	Execute		
8. CRM Phase III Portal Update: Placeholder to enhance the portal with other Services; Community Services and Development Services Leads.					Planning	Execute	

4.0 UPDATE ON 2019 PROJECTS

Customer Service Project Overview (Tracking on Plan):

- More effectively track and respond to resident calls/inquires
- Phase II will to allow for on-line questions and reporting issues

Phase I started in February with go-live in May, 2019.

The image shows two overlapping screenshots of the City of Phoenix PHX At Your Service website. The background screenshot displays the main homepage with a search bar and navigation links. The foreground screenshot shows a specific page for reporting a street maintenance issue.

City of Phoenix PHX AT YOUR SERVICE

Register a PHX At Your Service account to get status updates for 17 requests for City of Phoenix service requests or reports. Current view sorts by Popularity

Service Requests: Submit & Track

START/STOP/TRANSFER WATER SERVICES OR TRASH	CITY SERVICES BILL DOCUMENT
TRASH, RECYCLE OR GREEN ORGANICS CONTAINER	LITTER + DEBRIS
NON-DUST-PROOF PARKING	INOPERABLE VEHICLES
OUTSIDE STORAGE	WEEDS OR DEAD PLANTS
SHOPPING CARTS	ILLEGAL SIGNS
UNSECURED STRUCTURES	AMERICANS WITH DISABILITIES

Report a Street Maintenance Issue

Report Street General Repair or Maintenance

If this matter requires immediate attention, please contact the Street Maintenance Dispatch operator at (602) 262-6441

1 Contact 2 Issue 3 Photo 4 Location 5 Review

Your First Name: * Your Last Name: * *denotes required field

Street: Street 2:

City: State: Zip:

E-mail Address * Daytime Phone: (Use 10-digit phone number)

Next

4.0 UPDATE ON 2019 PROJECTS

*Phase I
started in
February with
go-live in June
2019.*

D365 Upgrade Overview (Tracking on Plan):

- The County's Microsoft Dynamics ERP is the critical enabling platform for initiatives such as Payroll and Planning and Development.
- The current Microsoft Dynamics upgrade is a necessary infrastructure component which will be leveraged against multiple initiatives.
- The project team intends to take advantage of process transformation opportunities and deliver improvements in operating performance to meet future operating budget challenges.
- Engaged 3rd party vendor (RSM) with extensive experience with upgrades to ensure quality and timelines are met.



4.0 UPDATE ON 2010-2021 PROJECTS

Payroll System Planning for 2020:

- Payroll is processed in Bellamy and will be decommissioned. Management has recently completed an RFI as part of its due diligence and reviewing alternatives.
- Benefits of the new system will include direct time entry in the field and the reduction of manual work processes associated with payroll processing.

Planning and Development System Planning for 2020-2021:

- The project in early stages, however, there has been an extensive review of current work processes that has identified numerous opportunities for improvement
- RFI expected in Q4/2019 or Q1/2020 to review alternative solutions.
- Note, Planning and Development System Technology is currently lagging behind peers.



Citizen Self Service

Involve citizens in the community development process.



Electronic Plan Reviews

Manage the plan review and submittal process within a browser-based, paperless environment.

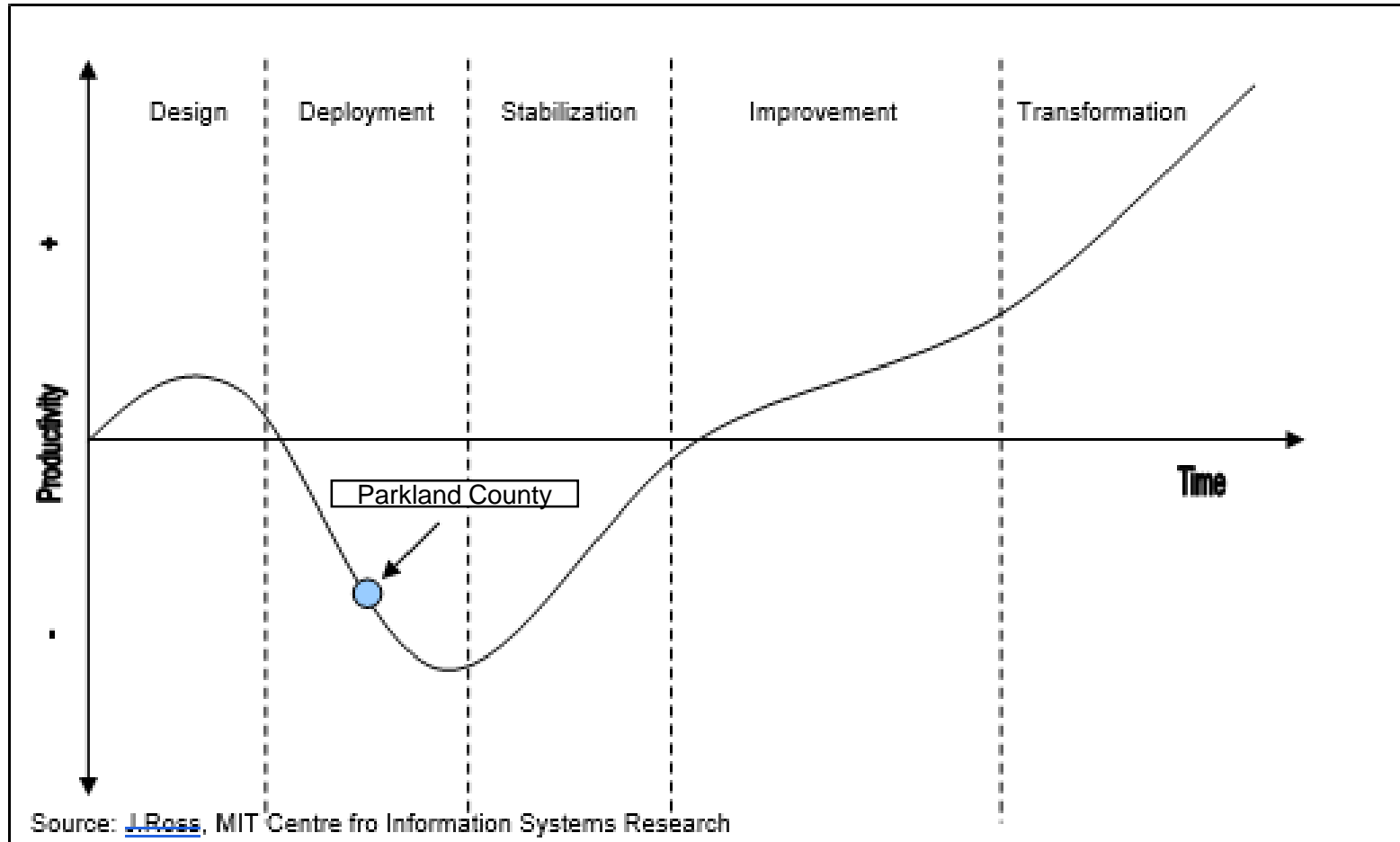


Work on the Go

Allow government field workers to manage caseloads, inspections, code enforcement, and the plan review process on the go.

5.0 LONG TERM IMPACT

- Life-cycle of projected benefits
- Parkland County is following an industry standard approach focusing on systems and process optimization; stepwise approach.



6. CONCLUSIONS

- Investments focus on advancing pillars and objectives in the County's Strategic Plan and reducing risk exposure for selected legacy systems.
- The proposed approach is structured to manage organizational capacity, organizational readiness and allow for tight project governance.
- Investments have a direct line-of-site to enhance services for residents and a focus on enabling efficiencies associated with long-term operating costs.