

1.0 Project Identification

Name of Project:	5a1 Implement a Project Management System
Sponsor: (Accountable)	Kate Allan
Project Manager: (Responsible)	Michelle Palmer
Project Team Members: (Responsible or Consult)	IT system requirement/integration (Great Plains, SharePoint, GIS) – Mark Giberson Project Leads – Chris W., Shawn D. Finance (link to reporting of spend on capital-funded projects) – Karen G Capital Budget (link to capital budget development) - Sheyenne Overall Finance – Kate Communications - Carly
Approved Budget:	\$100,000 approved in 2024 capital budget

2.0 Business Need

The City has implemented an annual work plans process which utilizes fillable pdfs to capture projects, core services, to operationalize the Strategic Plan, Legislated Requirements, Master Plans & Strategies, Committee/ Council requests, as well as other capital-funded projects.

The City utilizes Excel to track ongoing capital projects with manual updates from the City's financial system Great Plains. Capital projects are initiated by having staff complete fillable pdf forms used for each capital budget request.

5a1 - Implement a Project Management System to replace the current Microsoft Excel-based process with a purpose-built solution that will provide Customized Reports based on identified needs and best practices to capture all projects whether capital funded or not.
(planned Q4 2023 – Q3 2024)

3.0 Project Objectives (Purpose)

The City is looking to improve both the processes and information collected and reported through the organizational project planning and budget process.

- Strengthen process alignment and integration across project planning, budgeting and reporting
- Strengthen accountability and role clarity towards the achievement of strategic priorities and project outcomes

4.0 Project Scope

1. Organizational Project Planning Software
 - Implementation of an Organizational Project Planning software that will allow staff to create a multi-year business plan through the tracking of projects from a project management perspective, including prioritization of project, resource requirements (including human and financial), integration with financial software to track actual spend information, imbed key performance indicators to measure and track progress, build reports and share dashboards to indicate achievement of goals.
 - Implement reporting from system to develop a multi-year business plan (identifying all initiatives/projects)

5.0 Stakeholders

Name	Consult or Inform
Project Leads	Consult
Strategic Leadership Team	Inform
Managers/ Supervisors	Consult
Information Technology	Consult
Finance	Consult
Purchasing	Consult
Communications	Consult
Asset Management	Consult
Administrative Assistants/ Eng Services Administrator	Consult
Records management	Consult

6.0 High Level Deliverables / Milestone Dates

Item	Deliverables / Milestones	Dates
1.	Establish team and finalize project charter	December 2023
2.	Issue request for proposal	February 2024
3.	Completion of procurement for system	May 2024
4.	System Ready to Go Live	November 2024
5.	Training of staff on System	Fall 2024
6.	New projects into the system as part of mid-year capital update	December 2024
7.	Reporting from system	January 2025

7.0 Risks

Severity	Description	Mitigation Tactic
Medium	Meeting Project Deadlines	Meetings/ deliverables scheduled for project SLT confirmation of resources allocated to project
Low	Lack of Seeing the Benefit of the System	<ul style="list-style-type: none"> • Communication plan / education plan to be developed with audience-specific messaging and tactics • Project team members representatives from all user groups
Low	Lack of integration with other systems	Defined scope and requirements
Medium	Lack of system meeting requirements	Agreed upon system requirements at time of rfp (by team)
Low	Lack of defined process/concern with scope creep	Defined scope and requirements
Medium	System /data security	Include in rfp requirements
Medium	Lacking of Budget (100K approved)	Defined scope and requirements which identify must haves and “nice to haves” or phased approach

8.0 Key Results for Success (Must Be Measurable or Quantifiable)

1. Reduction in amount of time to consolidate and summarize capital detail sheets
2. Reduction in amount of time to consolidate procurement plan
3. Reduction in number of individual fields within forms which project leads need to complete (impacted forms would be workplan, capital detail sheets, procurement plan, capital progress sheet)
4. Increase reporting ability (e.g. resource requirements, project rationale, status) leading to improved communication, transparency, and accountability internally (captured within Employee Engagement Survey) and externally (captured Citizen Satisfaction Survey)