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Subject: **Project Update – Capital Project #211480 – 112 Time Absence Management & Scheduling Project**

Contact: Mark Medeiros, Interim Director of Finance / Treasurer,
905.874.2520, Mark.Medeiros@brampton.ca

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Recommendations:

That the report titled: **Project Update – Capital Project # 211480-012 – Time, Absence Management & Scheduling Project**, to the Committee of Council Meeting of March 31, 2021 be received.

Overview:

- The purpose of this report is to provide City Council with an update on the status of the Time, Absence Management & Scheduling (“TAS”) System Implementation Project.
- The City’s current time capture, absence management and scheduling processes are primarily manual and paper based, requiring extensive amount of staff time and administrative effort.
- Request for Proposal 2017-011 was issued and awarded in fall of 2018 to WorkForce Software, ULC to implement an automated Time Capture, Absence Management and Scheduling System (now referred to as “MyTime”).
- The MyTime Implementation Project kicked-off in early 2019 and has since successfully completed detailed design, testing and phased deployment plans for implementing the Time and Attendance, Advanced Scheduler, Absence Compliance Tracker and Analytics modules.

- **Given the complexity of effectively automating various existing Collective Bargaining Agreements, Corporate Policies, current operational practices and legislative requirements, five (5) weeklong workshops were held with various stakeholders, which resulted in approximately 4,300 business and calculation requirements. Each of these requirements were documented and evaluated as part of the system design and project implementation plan, which now includes sixteen (16) interfaces/integrations with other applications across the City.**
- **The MyTime project is considered the most technically complicated and comprehensive software implementation undertaken by the City to date and the heavy lifting that has been completed thus far, provides the foundation to move forward with a high degree of confidence.**
- **Once all modules of MyTime are fully implemented, it will enable the City to automate key workforce management activities and significantly reduce manual administrative work, thus allowing leaders and employees to focus on core value-added operational activities.**
- **The City went live on the solution as of November 9, 2020 with a pilot group of non-union employees (Wave#1) as the first part of a multi-year phased deployment approach.**
- **Under Council's guidance and with a focus on the Connected Initiative to "Develop and Implement a Workplace Modernization Strategy" as related to the Term of Council Priority that Brampton is a Well-Run City, the City has embarked on a transformational project in the area of employee time capture, absence management and scheduling processes, and made significant strides forward.**
- **The City has successfully launched MyTime with a pilot group of employees and is now focused on organizational change management and completing a phased deployment plan in an organized and controlled manner, to ensure quality and value to the rest of the City. The phased deployment is anticipated to run through the period of 2021 to 2023.**

Background:

The City's current employee time capture, absence management and scheduling processes are mainly manual, and paper-based, requiring an extensive amount of staff time and administrative effort for data entry, validation and corrections.

As the City has grown and continues to grow, these manual processes have become increasingly inefficient for workforce management in the areas of employee scheduling,

time reporting and absence management. Some examples of the current manual processes being utilized are:

- Employee Paper-Based Timesheets
- Time Entry (“TE”) Operator – Manual Data Entry
- Employee Timesheet Corrections
- People Leader - Time Tracking and Approvals
- People Leader - Leave Management Forecasting
- People Leader - Review/Approval TE Reports
- Meal Allowance Processing
- Manual Employee Scheduling Related Activities
- Printing, Photo Copying and Inter-office Mail
- Physical Storage (of paper documents - 7 years)
- Retrieval Costs from Archives (of paper documents when needed)
- Manual Long-term Absence Management Related Activities
- Training Cost (associated with complex and manual current process)
- Payroll Retro Costs (Manual Calculations)

Note that the average paper-based timesheet touches at least five (5) hands including Employee, Leader, TE Operator, Reviewer, Payroll Administrator and more, if any potential corrections are required.

Tied with the Connected Initiative to “Develop and Implement a Workplace Modernization Strategy” as related to the Term of Council Priority that Brampton is a Well-Run City, by continuously improving the day-to-day operations of the corporation by streamlining service delivery, effectively managing municipal assets, and leveraging partnerships for collaboration and advocacy, it was recognized as a priority that introducing tools and technologies in an automated system would align with this Term of Council Priority by:

- Reducing the manual work effort required with time administration to free employees and leaders to focus on core business and high value-added activities;
- Reducing duplication and potential for errors;
- Providing opportunities to introduce efficient business processes;
- Providing data and business intelligence to decision makers; and
- Helping the City align with the expectations of a diverse next-generation workforce with demands for robust technologies that are internet enabled and provide mobile-ready access.

To address this need and with Council endorsement, an RFP (2017-011) was issued for “Supply, Implementation, Hosting and Ongoing Management of a Time Capture, Absence Management and Scheduling System” to:

- a) Provide employee and manager online desktop and mobile self-service for timesheets and absence requests with an online workflow-based submission and approval process;
- b) Enable configuration of time reporting rules for the editing of timesheets during time reporting to ensure consistency with pay rules for the various lines of business, collective bargaining agreements and Corporate HR policies applicable to the employee;
- c) Provide automation in the detailed calculation of payable time (i.e. over-time, payable/unpayable sick time, shift premiums, etc.) from reported time in alignment with collective bargaining agreements, Corporate HR policies and legislative requirements;
- d) Integrate time capture with project costing to eliminate the duplicate processes for tracking, calculating and processing of labour costs as related to capital projects;
- e) Provide flexible and transparent leave forecasting with visibility for both management and employees of past, current and future approved leaves (i.e. vacation, sick leave, lieu time, etc.); and
- f) Provide a comprehensive corporate scheduling system to replace manual and spreadsheet-based scheduling processes across the organization.

This RFP was then awarded to WorkForce Software, ULC (the “Vendor”) with a contract signed in September 2018 to deliver a cloud-based, workforce management solution for factors including:

- Experience with more than 2 million users of the Vendor’s products across more than 1,000 organizations and 60+ countries;
- Robust product offerings that are purpose-built for complex labour environments in a diverse municipal government setting;
- Flexible and configurable solution to meet the varying needs of the City’s lines of business with different Collective Bargaining Agreements, pay policies and workforces;
- Cloud based with regional based data centres located in Canada with security standards that meet independently audited certifications and maintain leading uptime and system performance figures; and
- Perpetual innovations with continuous improvements and updates to introduce new functionality to allow the City to adopt and take advantage of the latest technological features in the industry.

The solution consists of four (4) key product modules:

- 1) **WorkForce Time and Attendance (“T&A”)**: T&A is a component that is designed to automate and standardize the time collection and approval processes;

Summary of Benefits: Captures detailed time and attendance reporting data through multiple methods (i.e. mobile devices, time capture devices, desktop, etc.) and automates that application of pay rules in alignment with corporate policies, Collective Bargaining Agreements and related legislation. Automated workforce management also significantly reduces the manual work required and frees leaders and employees to focus on their core operational activities.

- 2) **WorkForce Advanced Scheduler (“AS”)**: AS is a component that is designed to automate and standardize the employee scheduling process;

Summary of Benefits: Provides efficiencies and optimizes labour scheduling by automating factors and constraints (i.e. seniority, availability and qualifications); provides employee self-service tools for access to schedules, shift changes, etc. and allows workforce planning based on business needs.

- 3) **WorkForce Absence Compliance Tracker (“ACT”)**: ACT is a component that will allow the City to manage legislative compliance and interactions between the City and its employees regarding complex absence case management and various correspondence in a secure and confidential manner.

Summary of Benefits:

- a) Simplifying determinations by following simple questionnaires that shows exactly which laws and policies apply to a leave request;
 - b) Streamline case management with the help of case steps, due dates, and documents, all stored in one central and secure location;
 - c) Keep current with changing laws through the Vendor’s unique Compliance Portal and receive regulatory updates automatically; and
 - d) Improve communications about absence management, fostering a more transparent, positive, and employee-centric culture.
- 4) **WorkForce Analytics (“Analytics”)**: Analytics is a reporting and dashboard utility that harnesses detailed labour data, allowing the City to fine-tune workforce management activities, improve business analysis and workforce planning.

Summary of Benefits: With this comprehensive labour analysis the City will be able to:

- a) Access complete, accurate snapshots of the City’s employees’ day-to-day labour activities;
- b) Quickly identify cost-saving measures with greater visibility into workforce analytics; and

- c) Build simple, intuitive reports with drag-and-drop functionality and custom views.

In early 2019 the City's project team and the Vendor kicked off the project and internally branded the WorkForce Software solution and the implementation at the City as "MyTime".

At this point, the City entered into the detailed requirements and solution design phase to capture the City's detailed rules and requirements as related to calculating employee gross pay, leaves of absence and other key implementation requirements.

This process included five (5) weeklong Vendor lead workshops with representatives from the City's various operating departments to ensure the requirements were captured to allow the solution to be built and configured with calculation rules that comply with:

- Existing Collective Bargaining Agreements
- Existing Corporate HR Policies
- Past Practices
- Current Legislative Requirements

These five (5) weeklong workshops resulted in the documentation of over four thousand three hundred (4,300) business and calculation requirements.

By late-2019, the Vendor began the build and configuration phase, while the City began to prepare for testing of the solution and started development of the sixteen (16) interfaces/integrations with other applications at the City, with data required by the solution.

By early-2020, the City in partnership with the Vendor, started testing and deployment planning, which concluded in early-fall, with the City ready to go-live.

Current Situation:

The City successfully went live on the solution as of November 9, 2020 with a pilot group of non-union employees (Wave#1) as the first part of a multi-year phased deployment approach (vs. "big bang" approach).

A multi-year phased deployment approach was determined to be the best course of action for the City and consistent with benchmarking analysis as well as scoping of other municipalities of similar workforce size, pay profile diversity/complexity based on multiple Collective Bargaining Agreements. This phased deployment approach recognizes that:

- The solution drives the detailed and critical calculation of employee gross pay;

- Payroll is extremely time sensitive and needs to be accurate, with high visibility and impact to all employees;
- Significant volume and work-effort associated with testing of the solution against the detailed calculation requirements for different salaried and hourly pay groups;
- Resource availability for SMEs (Payroll, IT, HR and Operating Departments), with various time periods during year-end when deployments cannot be scheduled due to competing priorities (year-end reporting requirements, system upgrades, etc.); and
- Has a significant organizational change management component with a key impact on the need to also reassess various existing manual processes.

It also takes into consideration that it is the deployment of all four (4) modules outlined in the “Background” section of this report.

The phased deployment approach is anticipated to run through the period of 2021-2023 and is forecasted to have all non-union employees on the MyTime solution by the end of 2021, with the remaining employees continuing to be transitioned during 2022 - 2023. Throughout this time period, resources from the Vendor and City are required to support on-going testing, re-configuration (as needed) and organizational change management as part of execution of the phased deployment approach.

The scope of the Vendor’s existing contract will continue to provide implementation services and existing approved capital funds will provide funding for City resources to participate on the MyTime project through 2021. This is expected cover the remaining deployment of Wave#1 planned for over 800 non-union permanent and temporary employees in 2021.

To keep the phased deployment approach moving forward with the support of the Vendor in an implementation capacity after 2021, the project team has explored a managed services model from the Vendor. The managed services model will not only support the implementation/deployment, but will also support unknown variables that may be introduced during the phased deployment period as related to policy changes or business needs such as:

- Collective Bargaining Agreements
- Corporate Policies Modernization
- Legislative Changes (i.e., Bill148, etc.)
- Business Needs (i.e., COVID19, etc.)

In order take advantage of the Vendor’s managed services model and to provide backfill for City resources, an additional funding request for this project was approved by Council as part of the 2021 budget. The City has prioritized this project, due to its complexity and broad corporate impact, by committing internal resources to continue testing, deployment

and organizational change management activities to support the subsequent waves past the initial deployment, to ensure a timely and successful full implementation.

Under Council's guidance and with a focus on the Connected Initiative to "Develop and Implement a Workplace Modernization Strategy" as related to the Term of Council Priority that Brampton is a Well-Run City, the City has embarked on a transformational project in the area of employee time capture, absence management and scheduling processes, and made significant strides forward in partnering with a Vendor as a cloud software provider and implementation partner. The City has already successfully launched a pilot group of approximately thirty (30) employees that are part of the core project team from various operating departments, and is now focused on testing and further deployment in an organized and controlled manner, to ensure quality and value to the rest of the City.

The City's labour expenditures are one of the largest line items in the City's annual budget. With this in mind, even a 1% improvement of efficiencies created in "employee time administration" would result in a significant return on investment for this project. Based on the original business case and subsequent analysis, it is anticipated that once all modules of the solution are fully implemented, the expected potential payback on investment for the project will be within the 3 to 5 year time horizon.

For clarity, and although this initiative will deliver significant efficiencies to the City, most of the savings will not necessarily lead to corresponding budget reductions as the employee time administration work in the various operating departments accounts for only a portion of a given employee's overall responsibilities.

Savings will, however, be achieved in net productivity gains, better customer service and employee experience, as time will be freed up for higher value-added duties. This creation of potential capacity realized is intended for individual operating departments to leverage in the future.

Corporate Implications:

Financial Implications:

There are no direct financial implications from this report. The total estimated budget for the MyTime project is \$9,338,000, of which \$5,803,000 has been approved in previous budgets, with spending of \$2,492,909 as of December 31, 2020.

	Approved Budget	Expenditures	Commitments	Budget Balance Remaining
Life-to-Date (2020)	\$3,290,000	\$2,492,909	\$523,569	\$273,522
2021	\$2,513,000	NIL	NIL	\$2,513,000
Total	\$5,803,000	\$2,492,909	\$523,569	\$2,786,522
	Forecasted Requirement			
2022*	\$2,149,000	-	-	-
2023*	\$1,386,000	-	-	-
Total	\$3,535,000	-	-	-

*Please note the 2022 and 2023 budget requirements of \$3,535,000 have been approved in-principle as a forecast in the 2021 Capital Budget. Future funding requirements for the project will be included in the 2022 and 2023 Capital Budget requests, subject to Council's consideration and approval.

Other Implications:

There are no other implications resulting from this report as this is for informational purposes only.

Term of Council Priorities:

This report achieves the Term of Council priority of Brampton is a Well-Run City, by continuously improving the day-to-day operations of the corporation by streamlining service delivery, effectively managing municipal assets, and leveraging partnerships for collaboration and advocacy.

Conclusion:

This report provides Council with an update on the status of the MyTime project and an overview of the upcoming deployment approach.

Authored by:

Reviewed by:

Zeeshan Majid,

Mark Medeiros, Interim Treasurer

Senior Manager, Accounting Services
and Deputy Treasurer, Corporate
Support Services

Corporate Support Services

Dean Fisher,
Program Manager, IT, Digital
Innovation and IT, Corporate Support
Services

Kumanan Gopaldasamy
Chief Information Officer, Digital
Innovation and IT, Corporate Support
Services

Approved by:

Submitted by:

Michael Davidson, Commissioner,
Corporate Support Services

David Barrick, Chief Administrative Officer