

GBET 2001 - Government Business Education & Tech Expo

Project Management Methodologies and Tools

Planning

Presenters

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Implementation

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Objectives

- **Describe the Four Essential Phases of a Project**
 - Plan
 - Define
 - Acquire
 - **Implement**
- **Prepare Participants to Address Risks to Project Success**
- **Develop Awareness of Risk Factors by Examining “Real Life” Project Management Issues**

Agenda

- **Implementation**
- **Workshop Exercise**
- **15 Minute Break**

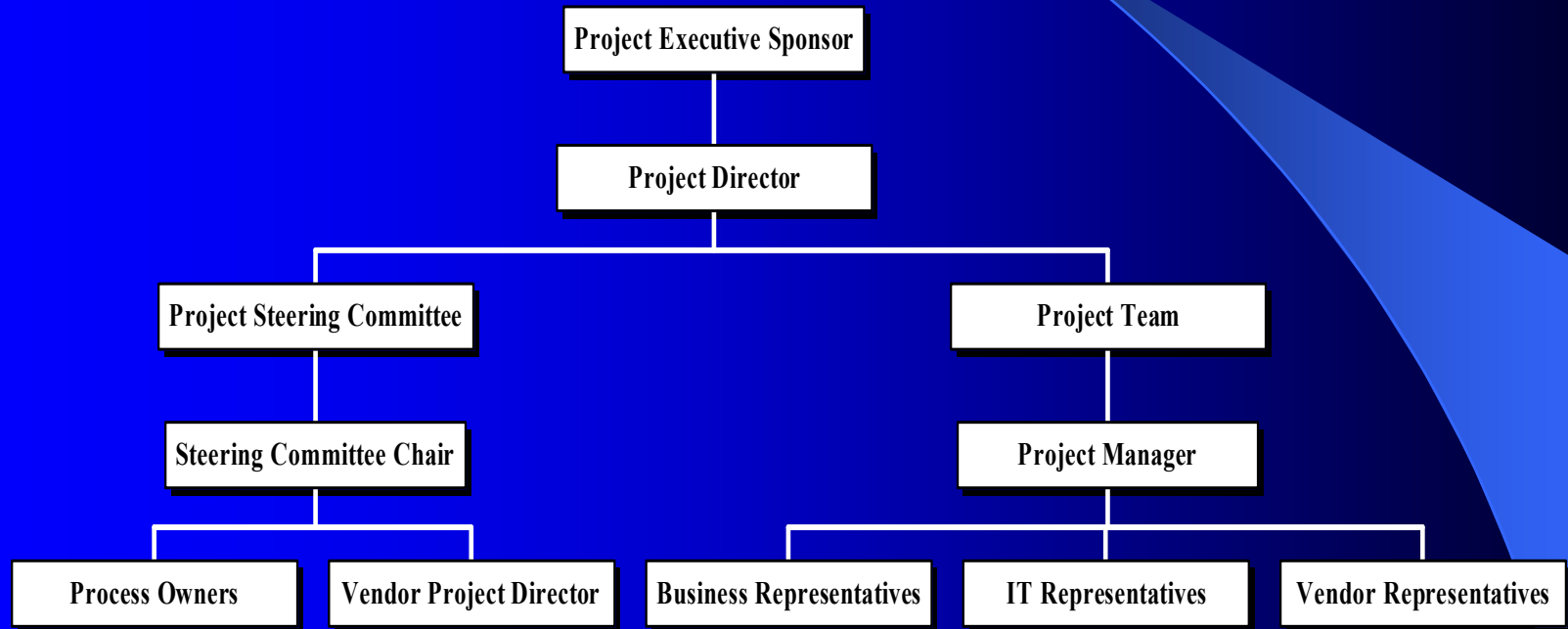
Critical Success Factors

- **Project Roles and Responsibilities**
- **Project Organization**
- **Project Plan**
- **Issue Tracking**
- **Plan Implementation**
- **Execute and Control Plan**
- **Close Project**

Project Roles and Responsibilities

- **Executive Sponsor**
- **Project Director**
- **Steering Committee**
 - **Steering Committee Chair**
 - **Process Owners**
 - **Vendor Project Director**
- **Project Team**
 - **Project Manager**
 - **Business Representatives**
 - **IT Representatives**
 - **Vendor Representatives**

Project Organization



Project Plan

- **Define Plan**
 - **Tasks**
 - **Milestones/Deliverables**
 - **Duration**
 - **Schedule**
 - **Resource Assignments**
 - **Critical Path**
- **Organize Plan into Small Subprojects**
 - **Set Discrete Start and End Dates**
 - **Complete Each Subproject Before Proceeding to Next**

Issue Tracking

Identify All Issues in a Single Database

- ❑ Define Issue
- ❑ Set Priority
- ❑ Assign Responsible Party
- ❑ Schedule Completion Date
- ❑ Track Issue
- ❑ Escalate as Required
- ❑ Close Resolved Issue

Implementation Subprojects

Organize Implementation Plan by Subprojects

- **Risk Management**
- **Analysis**
- **Site and Equipment**
- **Security**
- **Software Development**
- **Data Conversion**
- **Training and Documentation**
- **Maintenance and Organization**
- **Testing**
- **Go-Live**

Risk Management

- **Monitor Task Completion**
 - **Conduct Weekly Project Team Status Meetings**
 - **Maintain Issues Tracking Database**
 - **Address Scope and Change Management Issues**
 - **Review Progress With Project Director Weekly**
 - **Escalate Issues As Required to Steering Committee**
- **Review With Project Management**
 - **Provide Monthly Status Reports**
 - **Identify Subproject Completion Status**
 - **Review Anticipated Accomplishments for Next Reporting Period**
 - **Resolve Issues**

Analysis

- **Prepare Use Cases and Identify Workflow Modifications**
 - **Reflect Organization's Requirements and Knowledge of Vendor/Internal Solution**
- **Analyze Use Cases**
 - **Review Use Cases and Determine Application Support for Requirements**
 - **Assess Data Requirements**
 - **Review Reporting Requirements**
- **Prepare System Design Report (SDR)**
 - **Prepare Design**
 - **Approve SDR**

Site and Equipment

- **Prepare Site and Facility**
 - **Review Facilities for Needed Modifications**
 - **Make Site/Facility Modifications**
- **Acquire and Install Equipment**
 - **Order Required Hardware**
 - **Configure Hardware at Site**
- **Test Hardware**
 - **Conduct Hardware Diagnostic and Reliability Tests**
 - **Accept/Reject Hardware**

Security

- **Establish Security Procedures**
 - **Define Security Profiles**
 - **Implement Security Procedures**
 - **Establish Remote Access Procedures for Vendor**
- **Establish System Regions**
 - **Development**
 - **Testing/QA**
 - **Training**
 - **Production**

Software Development

- **Develop/Modify Software**
 - **Develop/Modify Per SDR**
 - **Conduct Regular Development Review Sessions with Project Team**
- **Install and Test Software**
 - **Prepare Function Test Scripts to Configure Software Based on Use Cases**
 - **Install Software**
 - **Conduct Tests and Record Results**
 - **Re-Test Builds As Required**

Data Conversion

- **Prepare Conversion Plan**
 - **“Map” Data from Old Manual/Automated System to New**
 - **Confirm Conversion Volumes**
 - **Address “Straddle” Cases**
- **Conduct Unit Tests and Convert Data**
 - **Prepare Conversion Test Scripts With Expected Values**
 - **Install Conversion Software**
 - **Conduct Unit Tests and Record Results**
 - **Examine Rejected Data**
 - **Re-Test As Required**
 - **Accept/Reject Conversion**

Training and Documentation

- **Train Users**
 - **Define Vendor/IT and User Roles and Responsibilities**
 - **Prepare Training Facility, Training Materials**
 - **Train Staff and Evaluate Training**
 - **Allow for Refresher Training**
- **Prepare Documentation**
 - **Prepare User Manuals Based on Revised Use Cases**
 - **Coordinate Documentation Production With Training**

Testing

- **Prepare System Integration Test**
 - **Develop Test Scripts and Data Based on Revised Use Cases**
 - **Conduct System As a “Whole”**
- **Conduct System Performance Test**
 - **Simulate Use of System For Full Life-cycle**
 - **Re-initialize Database After Successful Test**

Maintenance and Organization

- **Define Maintenance Procedures**
 - **Define Vendor/IT and User Roles and Responsibilities**
 - **Prepare Software and Hardware Maintenance Procedures**
 - **Train Maintenance Staff on Procedures**
- **User Organization**
 - **Review Business Processes to Determine Staff Roles and Responsibilities**
 - **Staff Allocation, etc.**

Go-Live

- **Establish Go-Live Procedures**
 - **Establish “Command Center”**
 - **Identify Issues for Resolution**
 - **Identify Vendor/IT and User Roles and Responsibilities**
 - **Go-Live**
 - **Provide Refresher Training As Required**
- **Monitor System for Final Acceptance**
 - **Monitor Per Acquisition Agreement**

Close Project

- **Accept System**
- **Assign Remaining Implementation Issues**
- **Document “Lessons Learned” for Future Projects**
- **Close Project**

Workshop Exercise

Problem

- **The Director of a State Department of Transportation (DOT) Has an Old Inventory System That Should Be Replaced**
- **He Assigned the Project to His Deputy Director Who Asked One of Her Managers to Organize a Team to Define Requirements**
- **After Defining Requirements the Team Learns of a Similar Project Already in Implementation With a Selected Vendor**
- **They Receive Permission From the Deputy Director to Join the Implementation Project Using the Selected Vendor Who Provides an Integrated Financial System**
- **The Teams Meet Periodically, but Has Difficulty Participating in the Project Since the Scope Has Grown to Include General Ledger, Purchasing, Accounts Payable and Accounts Receivable**

Solution

- **The Team Did Not Address the Change in Project Scope**
 - **Complete A Gap Analysis To Ensure That the Vendor Solution Meets the Needs**
 - **Define Modifications to the Vendor Solution**
 - **Revise the Project Plan**
 - **Update the Project Organization to Include a Representative from DOT**

Summary

- **Organize Project Management**
 - **Incorporate Vendor in Process**
- **Prepare Project Plan**
 - **Prepare Jointly by Vendor and Organization**
- **Monitor Plan Execution**
 - **Communicate Project Status At Team, Director and Steering Committee Levels**
 - **Identify Issues Before They Become Significant Risks**
- **Close Project**
 - **Ensure All Remaining Issues Are Identified and Assigned**
 - **Document Lessons Learned from Project**

Questions

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Acquisition

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Objectives

- **Describe the Four Essential Phases of a Project**
 - **Plan**
 - **Define**
 - **Acquire**
 - **Implement**
- **Prepare Participants to Address Risks to Project Success**
- **Develop Awareness of Risk Factors by Examining “Real Life” Project Management Issues**

Agenda

- **Acquisition**
- **Workshop Exercise**
- **15 Minute Break**

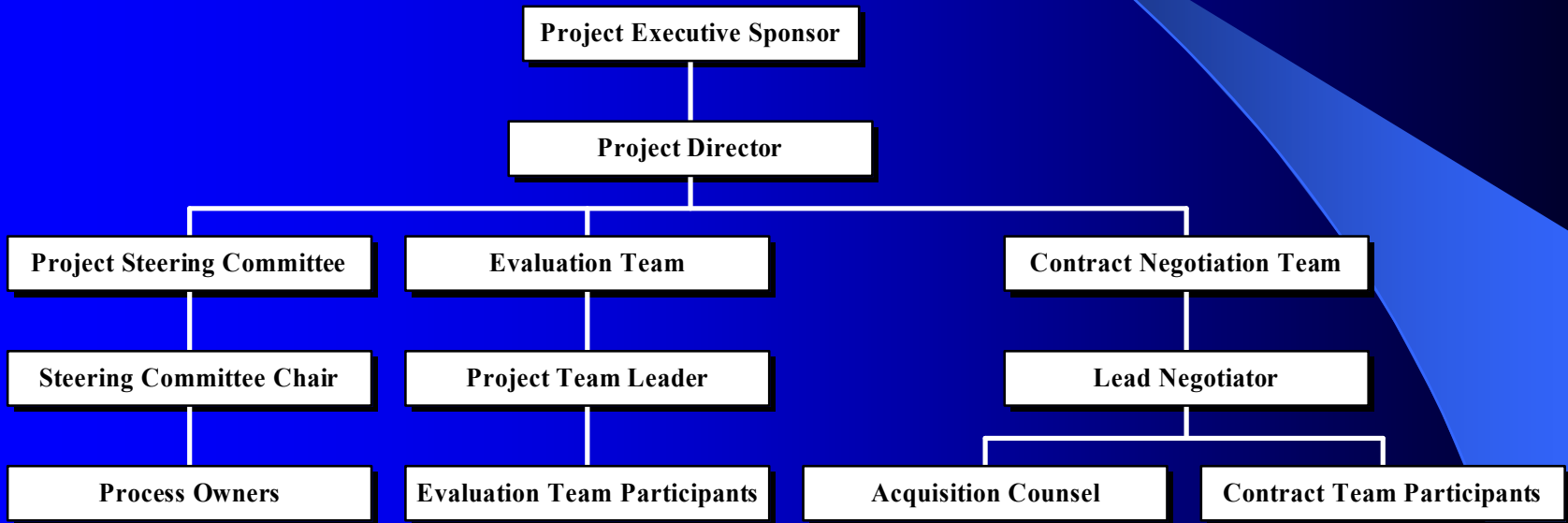
Critical Success Factors

- **Project Roles and Responsibilities**
- **Project Organization**
- **Project Plan**
- **Issue Tracking**
- **Objective Review**
- **Contract Components**
- **Automated Evaluation**
- **Proposal Verification**
- **Contract Negotiation**

Project Roles and Responsibilities

- **Executive Sponsor**
- **Project Director**
- **Steering Committee**
- **Evaluation Team**
- **Contract Negotiation Team**

Project Organization



Project Plan

- **Define Plan**
 - **Tasks**
 - **Milestones/Deliverables**
 - **Duration**
 - **Schedule**
 - **Resource Assignments**
 - **Critical Path**
- **Organize Plan into Small Subprojects**
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Issue Tracking

Identify All Issues in a Single Database

- **Define Issue**
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- **Schedule Completion Date**
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Objective Review

Typical Acquisition

- **Build Requirements “From Scratch”**
- **Issue RFP and Convene “Bidder’s Conference”**
- **Conduct Labor- and Time-intensive Review**
- **Score and Evaluate Proposals Manually**
 - **Increased Risk of Bias, Errors and Protests**
- **Focus on Immediate Acquisition Rather Than Reusable Requirements**
- **Focus on Cost**

Objective Review

Automated Acquisition

- **Issue RFP Built From Reusable Requirements Database**
 - Establish Objective Evaluation Criteria
 - Prioritize Requirements
 - Identify Mandatory and Desirable Requirements
 - Weight Individual Requirements
- **Address Vendor Questions In Writing**
- **Maintain Consistent Requirements For Re-Use In Other Projects**
- **Focus on Value**

Contract Components

Include Contract in RFP

- **Standards Terms and Conditions**
- **Milestones Tied to Payment Schedule**
- **Holdbacks Tied to Acceptance Testing**
- **Performance Standards**
- **Project Schedule**
- **Change Order Procedures**

Automated Evaluation

- **Focus on Top Proposals**
 - **Reject Vendors Not Meeting Mandatory Requirements**
- **Automatically Score Remaining Proposals Based on Responses to Each Requirement**
- **Score “Short Answer” Questions**
- **Compare Responsive Proposals Based on Computed Scores**

Proposal Verification

Vendor Demonstrations

- **Prepare “Scripts”**
 - **Base Scripts on User Requirements**
 - **Reflect a “Day In The Life” of the Office**
- **De-Brief and Re-Score Proposals After Each Demonstration**
- **Update Issues List**
- **Select Vendor(s) for Site Visits**

Proposal Verification

Site Visits

- **Prepare Scripts**
 - **Base On Issues List**
 - **Align Evaluation Team Members With Counterparts**
- **Address Vendor Qualifications with Site Personnel**
- **De-Brief and Re-Score Proposals After Each Visit**
- **Update Issues List**
- **Recommend Vendor Solution to Steering Committee**

Proposal Verification

Select Vendor

- **Review Evaluation Team Recommendations**
- **Discuss Open Issues**
- **Make “Apparent Successful” Vendor Selection and Notify Vendor They Are One of Many Finalists**

Contract Negotiation

Preparation

- **Convene Negotiation Team**
 - **Representatives from Business, Procurement, Finance, Legal, Risk Management, Information Technology and Executive Management**
- **Prepare Negotiation Issues List**
 - **Define Negotiating Issues and Fallback Positions**
 - **Prioritize List**
- **Share Issues List With Vendor**
 - **Request Vendor Quantify Any Changes (e.g., Resource, Cost, Time, Legal, etc.)**

Contract Negotiation

Begin Negotiations

- **Obtain Vendor Update to Issues List and Assess Impact**
- **Organize Final Issues List**
- **“Vet” Issues with Negotiations Team**
 - **Helps Prepare for Negotiations and Understand Vendor Position**
- **Convene Exploratory Session With Vendor to Clarify Issues and Positions**
 - **Update Issues List and Document Any Changes**
 - **Prioritize Final List**

Contract Negotiation

Negotiate Contract Issues

- **Schedule Sessions**
- **Commence Sessions With “Marked Up” Issues List**
- **Control Negotiations**
 - **Lead Negotiator Speaks for Team**
 - **Team Involved In Direct Negotiations As Required**
- **Establish Final Positions**
- **Conduct Final Agreement Review**
- **Accept or Reject Agreement**
 - **Prepare Final Agreement for Adoption**

Workshop Exercise

Problem

- **A City Finance Department Signed a Contract With a Vendor for a New Finance System Using the Vendor Contract With Attachments for the Work Plan, Payment Schedule and Ongoing Support Services**
- **The Payment Schedule Includes Milestones for Contract Signing, Software Installation, Training, and Cutover to the New System**
- **The City Asked the Vendor to Migrate Its Product to Oracle to Comply With the City's New Standards**
- **In Contract Negotiations, the Vendor Sales Manager Agreed and the City Kept Tapes of All Negotiations to Ensure Compliance**
- **In the First Week of the Project, the City Received an Invoice for 50% of the Contract Value for the Contract Signing Milestone**
- **The Project Manager Fears the City Will Not Have Financial Leverage to Ensure Project Success While the Vendor Begins Charging Interest on Overdue Payments Per the Contract**

Solution

- **The Current Contract Is Insufficient for Managing a Successful Implementation**
 - **Stop the Project and Return the Software to Avoid Payment**
 - **Negotiate a New Agreement**
 - **Payment Milestones Tied to Quality Completion of Service**
 - **Performance Standards for Entire Project Scope**
 - **Holdbacks That Allow Time to Test and Accept the System**
 - **Agreements Should Cover All Phases, Including Future Database Needs**

Summary

- **Establish Project Organization**
- **Prepare Evaluation Criteria**
- **Issue Automated RFP**
- **Score and Evaluate Proposals**
- **Validate Proposals**
- **Prepare Negotiation Issues**
- **Negotiate Contract**
- **Approve/Reject Agreement**

Questions

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Definition

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Agenda

- **Definition**
- **Workshop Exercise**
- **15 Minute Break**

Requirements Definition

“They [IT Management] look at technology requirements, not the business requirements. When people talk about needing shared storage or SANs, that begs the question. The question should be, ‘What are you trying to do?,’ ‘What business goals are you trying to achieve?’”.

Computerworld, October 15, 2001

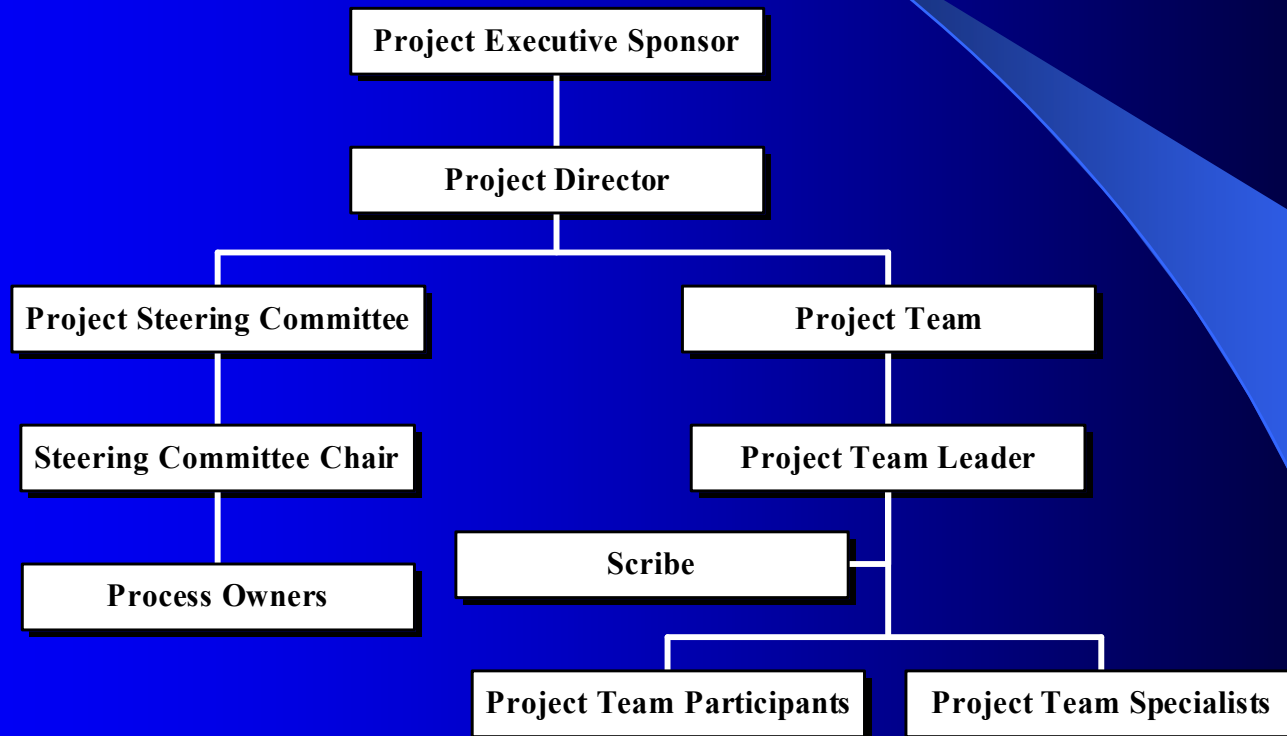
Critical Success Factors

- **Project Roles and Responsibilities**
- **Project Organization**
- **Project Plan**
- **Issue Tracking**
- **Requirement Libraries™**
- **Computer-Added Software Engineering (CASE) Tools**
- **Consensus Definition of Written Requirements**

Project Roles and Responsibilities

- **Executive Sponsor**
- **Project Director**
- **Steering Committee**
- **Project Team**
 - **Team Leader**
 - **Project Team**
 - **Project Team Specialists**
 - **Scribe**

Project Organization



Project Plan

- **Define Plan**
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Requirements Libraries

- **Reusable Baseline Requirements Customizable to Support Efficient Definition of Unique Needs**
- **Our Proprietary Libraries Include User, Technology and Vendor Requirements**

CASE Tools

- **Computer-Added Software Engineering (CASE) Tools Support Efficient Analysis, Design and Programming**
 - **Strengths – Rigorous Definition**
 - **Weaknesses – Complex, Time Consuming Effort**
- **Procure™ – Our Proprietary CASE Tool**
 - **Supports Definition, Acquisition and Implementation**
 - **Uses Requirements Libraries**

Consensus Definition of Requirements

- **User**
- **Technology and Vendor**
- **Contract**
- **Administrative**

User Requirements

- **Project Participants**
 - **Project Team (Business Representatives)**
 - **Facilitator**
- **Types of User Requirements**
 - **Business Processes**
 - **Information or Data Requirements**
 - **Data Relationships**

Business Processes

Define Operational Procedures

- **Identify Workflow Improvements**
- **Specify Both Manual and Automated Processes**
- **Describe “How It Should Be,” Not “How It Is”**

Data Requirements

- **Define the Information Needed to Complete Processes**
- **Application-Specific Examples**
 - **Justice – Defendant, Charge, Case**
 - **Healthcare – Patient, Diagnosis, Test, Treatment**
 - **Financial Management – Account, Level, Organization**

Data Relationships

Define Relationships Between Data

- **Person With Telephone Number**
- **Telephone Number With Telephone Number Type (e.g., Cell, FAX, Office, Etc.)**
- **Date With Business Event**

Procurement Options

- **“Renew” – Existing Application**
- **“Buy” – Vendor Package**
- **“Build” – Custom Development Internally
With Contractor**

Cost Analysis

- **Renew or Build – Develop Cost Estimates Based on Extent of Modifications or New Construction**
 - **Internal – Available Internal Expertise and Time**
 - **External – Contract Development Resources**
- **Buy – Interview Vendors To Determine If Viable Package Available**
 - **Define Vendor Support of Requirements**
 - **Request Preliminary Cost Estimate**

Cost Factors

- **One-Time Costs, Including**
 - **Application, Operating System, Database Software**
 - **Hardware, Including Existing Equipment Upgrades**
 - **Project Management and Staff**
 - **Contract Implementation Services**
- **On-Going Costs, including**
 - **Software Support**
 - **Hardware Maintenance**

Benefit Analysis

- **“Hard” Cost Avoidance**
 - **Reduces Future Training, Help Desk and Maintenance Costs**
 - **Eliminates Legacy System Maintenance Costs**
- **“Soft” Cost Benefits**
 - **Improved Productivity**
 - **Establishes Progressive Community Image**

Technology & Vendor Requirements

Project Participants

- **Technology Professionals – System Administrators, Network Specialists, Database Administrators**
- **Business Area Representatives – Operational, Management**

Five Types of T & V Requirements

1. Application Software

- ❑ **Data Entry**
- ❑ **Training**
- ❑ **Reporting**
- ❑ **User Interface**
- ❑ **Documentation**
- ❑ **Support**
- ❑ **Security**

Five Types of T & V Requirements

2. Hardware and Equipment

- **Capacity**
- **Performance**
- **Standards Compliance**
- **Documentation**
- **Printer**

Five Types of T & V Requirements

3. Statement of Work

- **Planning**
- **Installation**
- **Testing**
- **Cutover and Acceptance**
- **Maintenance**

4. Costs

- **One-Time**
- **On-Going**

Five Types of T & V Requirements

5. Vendor Qualifications

- ❑ Installation History
- ❑ Staff Qualifications
- ❑ References
- ❑ Financial Stability

Administrative Requirements

- **Project Participants**
 - **Procurement Specialists**
 - **Material Management**
 - **Contract Specialists**
 - **Business Representatives**
 - **Business Area Managers**
 - **Agreement**
 - **Attorney with System Acquisition Specialty**
- **Types of Administrative Requirements**
 - **Evaluation Process**
 - **Purchasing Requirements**
 - **Contract**

Examples of Administrative Requirements

- **Evaluation Process**
 - **Methodology**
 - **Minimum Requirements**
 - **Evaluation**
 - **Preliminary Selection**
 - **Validation**
 - **Criteria**
- **Purchasing Requirements**
 - **Schedule**
 - **Communications with Staff**
- **Contract**
 - **Standard Terms and Conditions**
 - **Project Specific Terms and Conditions**

Workshop Exercise

Problem

- **A Southwest County Has Decentralized All HR Functions to Individual Departments**
- **While Central HR Provides Some Standards and Policies, All Enforcement Is Managed by Department HR Coordinators**
- **IT Began Gathering Requirements for a New System by Interviewing Representatives From Central HR and From Some of the Departments**
- **Requirements Focus on Shortcomings of the Current System and Automated Processes Since the IT Representatives Do Not Have Authority to Change Future HR Policies**
- **The Head of Central HR Is Concerned That the New Requirements Will Duplicate the Current System Shortcomings**

Solution

- **The Current Process Does Not Promote Consensus Definition of Requirements**
 - **Conduct JAD Sessions With Representatives From Different Departments, HR Functional Areas, and Area Specialists**
- **No One Has Been Identified to Change Policy**
 - **Identify a Project Executive Sponsor and Director to Oversee the Project**
 - **Assign Process Owners to Define New Policy**
 - **Maintain an Issues Tracking Database for Issue Identification and Resolution**
- **Requirements Should Emphasize the Future**
 - **Define the Future Workflow for Both Manual and System Processes and the Data Elements Needed**

Summary

- **Obtain Executive Sponsorship**
- **Establish Project Organization**
- **Define Requirements**
 - **User**
 - **Technology**
 - **Administrative**
 - **Contractual**
- **Assess “Renew,” “Build,” “Buy” Cost and Benefit Options**
- **Select System Renewal or Replacement Options**

Questions

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Planning

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The Mad Hatter in Through the Looking Glass, Louis Carroll

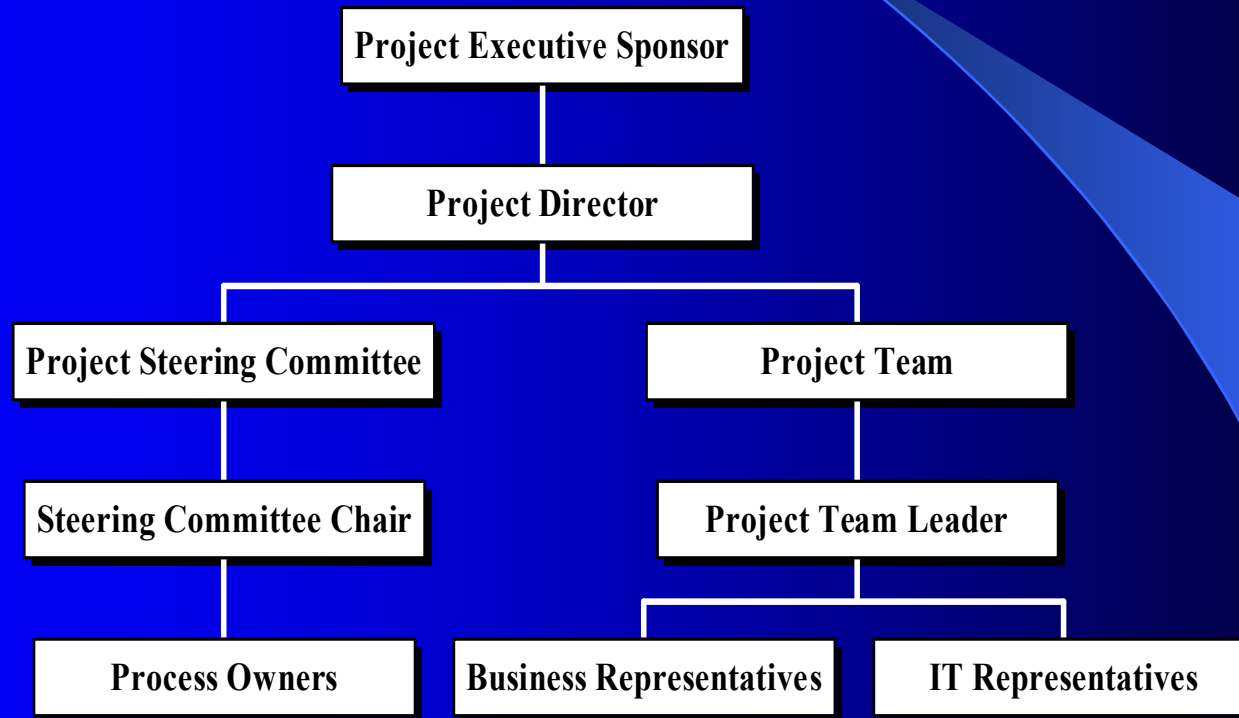
Critical Success Factors

- **Project Roles and Responsibilities**
- **Project Organization**
- **Project Plan**
- **Issue Tracking**
- **Business Direction Shapes IT Plan**
- **Plan Must Assess Current and Target Environments**
- **Each Project Requires a Tactical Plan**
- **Include Near- and Long-Term Needs in Master Schedule**
- **Conduct a Cost/Benefit and Funding Analysis**

Project Roles and Responsibilities

- **Executive Sponsor**
- **Project Director**
- **Steering Committee**
 - **Process Owners**
- **Project Team**
 - **Team Leader**
 - **Business Representatives**
 - **IT Representatives**

Project Organization



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Outcomes

- **Communicates Executive Priorities to Enterprise**
 - Provides Measures for Performance Toward Goals
 - Allows Staff to Manage Priorities
 - Establishes “Living Document” as Priorities Change
- **Builds Consensus for Shared Needs**
- **Identifies Organizations With Unique Requirements**
- **Creates Realistic Expectations**

Approach

- **Strategic Business Plan**
 - Identifies Future Business Direction
 - Focuses on Long-term Business Goals
 - Emphasizes Business Vision and Scope
 - Allows Changes in Priorities
- **Strategic IT Plan**
 - Aligns IT with Long-term Business Goals
 - Emphasizes Technology Vision and Scope
 - Allows Changes in Priorities
- **Tactical Plan**
 - Focuses on Single Project
 - Emphasizes Near-term Implementation
 - Results in Completed Project

Strategic Business Planning

Defines Business Direction

- **Formal Concept for Delivering Business Services**
- **Final Purpose to Delivering Business Services**
- **Components to Deliver Business Services Successfully**
- **Delivery Mechanisms for Efficient Business Service Delivery**
- **Business Priorities**

Strategic IT Planning

- **Prioritizes IT Direction to Support the Strategic Business Plan**
 - **Current IT Organization Structure**
 - **Current Funding for Existing and Future Systems**
 - **System Development Methodology**
 - **Current Technology Environment**
 - **Target Technology Environment**
 - **Gap Analysis**
 - **System Priorities**
 - **IT Organization Structure**
 - **Master Schedule**
 - **Cost/Benefit and Funding Analysis**

Current Environment

- **Current IT Organization Structure**
- **Current IT Budget**
- **System Development Methodology**
 - **“Buy” Vendor Packages**
 - **“Build,” or Custom Develop Applications**
 - **Internal Development Resources**
 - **Contractors**
- **Current Technology Environment**
 - **Inventory All Systems**
 - **Networks, Etc.**

Target Environment

- **Identifies Needs to Support Target Environment**
 - ❑ **Software – System and Database Software**
 - ❑ **Application – Business Applications**
 - ❑ **Technology – Equipment, Network Infrastructure**
 - ❑ **Information – Video, Voice, Integrated Data**
 - ❑ **Organization – IT Organization Structure**
- **Users**
 - ❑ **Departments Served**
 - ❑ **Number of Users**
 - ❑ **System Dependencies**

Gap Analysis & Target System Priorities

- **Gap Analysis**
 - **Compares Current and Target Technology Environments**
 - **Identifies Specific Target Solutions Required to Close Gap**
- **Target System Project Priorities**
 - **Links Target Environment to Strategic Business Plan**
 - **Accounts for Precedence in Ordering Dependencies in Projects**

Target IT Organization Structure

Identifies Required IT Organization

- **Defines Delivery Mechanisms to Support the Target Environment**
- **Identifies Employee Training and Contractor Requirements**
- **Establishes Recruiting Needs**
- **Identifies System Development Methodology**

Target Master Schedule

- **Define 5-Year Master Schedule**
 - **Projects**
 - **Duration**
 - **Resource Requirements**
 - **Critical Path**
- **Organize Master Schedule By Project**
 - **Reflects the Current Phase of Existing Projects**
 - **Accounts for Dependencies**
 - **Balances Impact of Change Across Organization**

Cost/Benefit and Funding Analysis

- **Identifies One-Time and Recurring Costs of Target Systems**
 - **Internal – Available Internal Expertise and Time**
 - **External – Third-Party Resources**
- **Quantifies Offsetting Benefits**
 - **Training and Maintenance Savings Driven by Retirement or Renewal of Older Systems**
- **Highlights New or Supplemental Funding Requirements**

Cost Factors

- **One-Time Costs**
 - **Application, Operating System, Database Software**
 - **Hardware, Including Existing Equipment Upgrades**
 - **Contract Implementation Services**
- **On-Going Costs**
 - **Software Support**
 - **Hardware Maintenance**
 - **Internal and Third Party Personnel Costs**

Benefit Analysis

- **“Hard” Cost Avoidance**
 - **Reduces Future Training, Help Desk and Maintenance Costs**
 - **Eliminates Legacy System Maintenance Costs**
- **“Soft” Cost Benefits**
 - **Improves Productivity**
 - **Establishes Progressive Community Image**

Tactical Planning

Individual Action Plans to Ensure Successful Management and Completion of Specific Projects

- **Definition**
- **Acquisition**
- **Implementation**

Workshop Exercise

Problem

- **A Northwest County Cannot Share Data Between Separate Legacy Court, District Attorney, Sheriff and Corrections Systems**
- **The IT Department (ITD) Developed a “Draft IT Strategic Plan” for Integrating the Systems**
- **The Draft Plan Includes an Inventory of Existing Systems, Technology Standards, RFP Requirements Developed by the Sheriff, Estimated Costs for Infrastructure Support of Integration and a List of Staff Assignments for the Future Project**
- **The ITD Director Presented the Draft Plan at the Monthly Executive Meeting and Asked Each Department to Sign-off**
- **The Next Steps Will Be to Begin Selection of a Vendor to Assist With Integration**
- **The District Attorney Is Concerned That the Requirements Are Insufficient**

Solution

- **The “Draft IT Strategic Plan” Is A Tactical Plan Without the Foundation in Either Strategic Business or IT Plans**
- **Project Organization Is Needed**
 - **Executive Sponsor, Project Leader/team, Stakeholders**
- **Additional Planning Is Needed**
 - **Definition of Integrated Justice Systems**
 - **Business Strategy**
 - **Priorities**
 - **Funding**
 - **Current and Target Environments With Gap Analysis**
 - **Master Schedule**
 - **Cost/Benefit and Funding Analysis**

IT Planning Summary

- **Obtain Executive Sponsorship Across Organizations**
 - Build Political Support Necessary for Successful Projects
 - Establish Shared Goals and Expectations
- **Establish Priorities for Target Environment**
 - Integrate the Business and IT Vision
- **Assign Clear Roles and Responsibilities for Executing Plan**
 - Encourage Open Communications
 - Assign Appropriate Stakeholder Roles and Responsibilities
 - Allocate Sufficient Resources to the Projects
- **Drive Tactical Plans Through Definition Process**

Questions