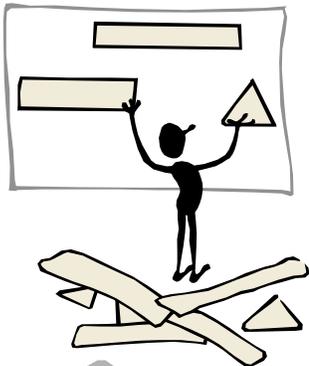


**Vision:** Provide consistent quality leadership in project management using industry best practices.  
Enhance the acceptance of cultural and technological change to maximize the benefits of major projects.

## Strategic Planning for FY04 - FY05

### Highlights . . . .

- Strategic Planning
- News from the Director
- Project Management
- Change Management
- ERP Service Delivery
- Projects & Kudos



*One of the activities that Major Projects' Team has under-taken recently is the development of a Strategic Plan.*

Why a Strategic Plan? Its intent is to be used to **break down** our Mission and Vision far enough to pinpoint exact processes and specific projects that lead to fulfilling the Mission or Vision. The Strategic Plan provides overall direction to the work of Major Projects, necessary to guide periodic business and work planning over a defined period of time. The Strategic Planning Process:

- Defines the desired goals and provides coherence to present and future activities;
- Provides the rationale for stated goals, objectives, and strategies;
- Provides the vehicle for planning and prioritization of work;
- Assists in the identification and implementation of projects and processes to support the achievement of the goals efficiently and effectively;
- Assists in the communication of purpose and intent;
- Assists in the measurement and management of achievement.

### Here's how the planning process works:

#### Step 1:

Partition our Mission and Vision into 3 - 5 Goal statements. These Goals, when met, will lead to either fulfilling our Mission or attaining our Vision – or both. Goals are general ends to which

an entity (e.g., Major Projects) directs its efforts.

#### Step 2:

Break down each of the Goals into 2 - 4 Objective statements per Goal. When the stated Objectives are completed, then the Goal from which they were derived is therefore achieved. Objectives are clear targets for specific action traceable to Goals.

#### Step 3:

Break down each of the stated Objectives into 1 – 4 Strategies for each Objective. When the stated Strategy or Strategies are implemented, the Objective from which they were derived is complete. Strategies are specific actions classified as projects or processes traceable to one, or more Objectives.

#### Step 4:

Determine how the outcome of each Strategy will be measured, and state the Measurement. Note, there may be more than one Measurement for each Strategy identified. Measurements are quantifiable results or impacts of stated strategies.

The Strategic Plan is therefore a tool that Major Projects will use to recognize projects and processes that are needed to fulfill our Mission and attain our Vision. A side benefit of this tool is to allow for accurately prioritizing of projects based upon the priorities of Major Projects' Goals and Objectives.

The Plan is due to hit theatres this holiday season, and promises to be full of stars and action.

**Stay tuned!**

### Mission Statement:

**"In synergy with DTI's mission, provide Diligent, Measurable and Practicable technology solutions for the State of Delaware. Under guidelines of the CIO, Major Projects builds economical and efficient technology solutions that enable the State of Delaware to serve, protect, and communicate effectively with its citizens."**

## Director's Office

It is with great pleasure to announce that we have reached a planned milestone for our team by publishing the first in the quarterly publication of the Major Projects' newsletter. We hope that this newsletter will help keep everyone better informed about what is happening in our area of DTI. We are also in the process of re-vamping the Major Projects' website and will let you know when it's ready for prime time!

### What is a "major project"?

Our definition of a major project is "a project that crosses organizational boundaries or significantly changes the way business is conducted in an organization". While the majority of major projects involve the implementation of new technology, we are also involved in projects where current business processes are being reengineered or optimized in *preparation* for new technology. In this initial newsletter, we attempt to provide a more detailed description of our key functions of **Project Management, Change Management and Enterprise Resource Planning (ERP) Service Delivery**.

### Project Management

Although Project Management is not new, it is a new section within DTI and we are becoming very involved with many programs and projects. One of our strategic goals is to significantly reduce the amount of time and money spent on major project implementations and ensure that the appropriate policies, procedures and resources are sufficient for post-implementation support. As many of you know, the State has not had a very good record in the past as it relates to very large projects. Providing project management standards will, among other things, ensure that proper team structures are in place, critical executive sponsorship is obtained, funding is appropriated and the correct methodology is selected.

### Change Management

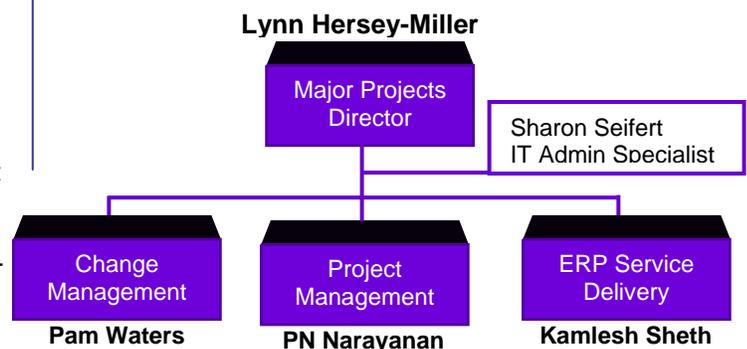
Change Management is not only a new section within DTI, but is in fact, a new way of doing business within the State. While Project Management focuses on specific project activities, milestones and deliverables, Change Management concentrates on the impact that a new system or process will have on the user communiTY. (*CommuniTY is not spelled incorrectly! Change Management attempts to gracefully integrate "IT" into the business world of state employees*). As technically complex as a project might be, the most difficult area is sometimes the *acceptance* of the project by its users. The goal of Change Management is to provide organizational "readiness" standards that will minimize the cultural impact of major project implementations and business process reengineering or optimization.

### Enterprise Resource Planning (ERP) Service Delivery

Everyone is familiar with the PHRST (Payroll, Human Resource Statewide Technology) system that was implemented in July 2001. Its history could fall into that category of "very large project...not so successful"; however, its history is very complex and many hard working people sacrificed a great deal in order to make it happen in 2001. To prevent history from repeating itself, the team documented lessons learned; created a comprehensive project plan for ongoing production support; and helped create a statewide project called "Project French Vanilla". The goal of Project "French Vanilla" is to analyze, recommend and implement solutions for removing modifications and customizations to the current PHRST (PeopleSoft) system. To-date, that project has been very successful. Because PHRST is at the center of the "ERP world" in Delaware and will consistently be involved in major upgrades and interfaces with other PeopleSoft systems, the decision was made to let PHRST remain under the direction of Major Projects. We were fortunate enough to retain several of the OIS folks and some of the consultants who worked on the upgrade and implementation in July 2001. PHRST continues to have very strong executive sponsor support and the ERP team is committed to providing quality service as the State continues to adopt industry best practices.

### DTI "partnerships"

The Office of Major Projects is held accountable for the successful implementation of all assigned programs and projects, the ongoing production support of the PHRST System, and the centralized management and coordination of e-Government initiatives. The size of our project teams will contract or expand depending upon the size and complexity of any given project. On all projects, there will be resources required from various other teams within DTI. We cannot, however, be successful without the continued cooperation and dedication from all DTI teams. Thanks to everyone for your continued support on several major projects that are currently underway.



# Project Management

## What is Project Management?

It is an interesting question, which can be answered in a simple term - "Everything." In life, each one of us meets with everyday activities needing planning, execution, and follow-up.

The past challenges that the State faced in managing the big projects have provided an opportunity to create a project management team. This is a fairly new concept in most States, though concepts of Project Management Offices (PMOs) have been tried many times in the past.

Hence, what will make this new setup deliver?

**Answer: CRISP**

**C**reativity

**R**isk management

**I**ntelligent decisions

**S**tandards

**P**erformance

The project management team provides the following services:

1. Development of major project plans;
2. Monitoring of the project plan and management of the resources (functional and technical);
3. Providing creative ideas for projects;
4. Writing project standards;
5. Providing risk assessment and mitigation;

## The Project Management Team



6. Coordinating with Change Management for readiness, training and communications.

7. Reporting to project executives and stakeholders.

For a fairly young team (in the last 15 months), the team has been involved in a significant number of projects; some of which are listed below:

- ERP Five year plan
- Pension PeopleSoft upgrade 7.0 – 8.0
- State Portal migration
- State School Closing System (DISS)
- ◆ PHRST upgrade 7.51 – 8.8
- E911 design of Web site
- ◆ Pension PeopleSoft upgrade 8.0 – 8.8
- ▲ 800 MHz
- ◆ E-Gov initiatives
- ◆ COTS Proof of Concept

● Completed on time and under budget  
 ◆ In progress    ▲ Initiated

As the project management team does not work in a vacuum, the projects listed above were possible only because of the excellent support received from not only the PHRST technical and functional teams; but also, DTI's Apps Delivery, Telecom, Data Center & Operations, External Operations and Enabling, System Engineering and Business Office teams.

Project Management works only as a catalyst, so the credit for successful completion goes to DTI for its pursuit of excellence, and to its important customers (PHRST, Pension, GIC, Courts, etc).

As a part of our long-term strategic vision, the project management team will provide systems and standards that will help to increase the predictability of project milestones and risks. This team is committed to working in sync with other DTI teams to provide consistent and repeatable project successes.

Some of the short-term goals are:

1. Project management tool evaluation and implementation (2nd qtr of 2004);
2. e-Government Program dashboard;
3. Standards documentation for:
  - a. Project Initiation Phase;
  - b. The Project Charter Deliverable.
4. Knowledge Management System for Major Projects.

*It is a great pleasure to work with such a wonderful team, and together, we can make a difference.*

# Change Management

*Change should be a friend. It should happen by plan, not by accident.*

*~ Philip Crosby, Reflections on Quality*

## What is Change Management?

As organizations mature, they develop a way of doing business that is “their” way. Part of this evolutionary process is change, but because organizations are by nature set in their ways, change is difficult. A way to manage this difficulty and still help organizations evolve is Change Management.

Change Management is the organized, systematic application of knowledge, tools, and resources of change that provide organizations with a key process to achieve their business strategy. In other words, Change Management is concerned with aiding organizations through transitions as they evolve and alter how they perform their daily business.

**Change Management** consists of three essential components:

### Communication

Change Management requires communication throughout the organization – from the executive level to the end-user level.

### Readiness

Readiness involves analyzing an organization to identify the current state and the future desired state, and then identifying what is required to move from one state to the other.

### Training

Hardware/Software changes, redesigned business processes, new or updated policies and procedures, data conversion, and security role establishment all affect how an organization works. Each of these activities requires training, and each training initiative must encompass multiple audiences, venues, and media. Although Change Management is not responsible for training development or delivery, we play a critical part in managing the training project plan to ensure these functions are accomplished prior to project implementation.

*Coming next issue . . . Change Management Communication in detail.*

## On the Horizon . . .

The Change Management (CM) Team developed Change Management Standards that will be published this month. These standards will help organizations integrate CM into any major project plan and business process reengineering (BPR) initiative.

The CM Team also developed Major Project Executive Reporting templates to be rolled out this month. These reporting templates are currently used by the PHRST ERP Executive Sponsors and will become a fixture on all major projects managed by the Office of Major Projects.

## What is the Change Management Team doing?

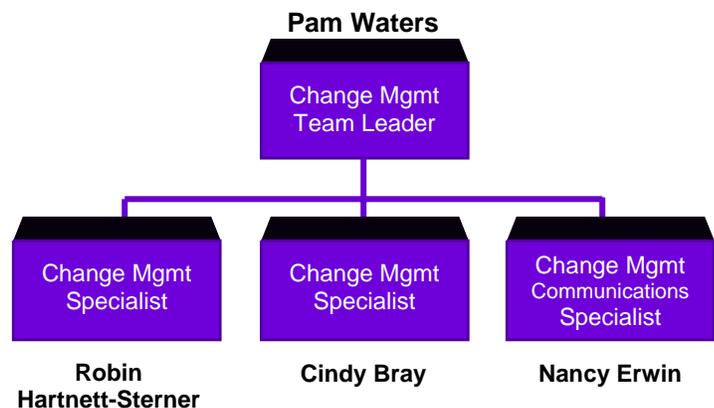
- PHRST Upgrade to V 8.8
- PHRST Project facilitation for Readiness and Training

The CM Team provides monthly Readiness Checklists to all 75 organizations to prepare them for the PHRST Upgrade to V 8.8.

- PHRST Time & Labor Implementation
- PHRST Training Project facilitation
- PHRST Workshops
- PHRST eBenefits
- PHRST Communications (newsletters, flyers, bulletins, web)
- PHRST Corrections Application Design
- PHRST Corrections Application Manuals
- ◆ PHRST Control/Metrics Book (Upgrade – Time & Labor – Recruitment – eRecruit)
- Major Projects Workbook
- Change Management Readiness Standards
- Executive Sponsor Reports for Major Projects Style Guide
- State Portal Content Management User Guide
- Business Case End-User Guide and Training Manual
- E911 Technical Subcommittee participation
- e-Government Dashboard User Guide and Service Desk Support Guide
- ◆ 800 MHz Next Generation
- ◆ C.O.T.S (Courts Organized to Serve)
- Delaware State Police Change Management Guidance
- ▼ DTI Business Information Systems Integrator (BISI) Workshop
- ◆ Business Case Summary iTIC Team
- ▼ Change Management Overview Workshop

■ On-going      ● Completed  
▼ In development      ◆ In progress

## The Change Management Team



# Enterprise Resource Planning (ERP) Service Delivery

## What is ERP Service Delivery?

ERP is an industry term for the broad set of activities supported by multi-module application software that helps an organization or government manage the important parts of its business. The deployment of an ERP system can involve considerable business process analysis, employee retraining, and new work procedures. For the State of Delaware, ERP modules currently include Pension, Human Resources, Benefits Administration and Payroll. The ERP vendor for the state is PeopleSoft (other ERP vendors include Oracle and SAP).

ERP Service Delivery provides ongoing Production Support to the State's mission critical PHRST (Payroll, Human Resource Statewide Technology) System.

## PHRST Production Support

In July 2001, the Human Resource (HR) module was *upgraded* from PeopleSoft version 6.02 to version 7.5 and the Benefits Administration and Payroll modules were *implemented* in version 7.5. The HR module is the front-end to the system and captures pertinent HR-related data for all state employees (e.g., name, address, salary, organization, etc.). Information from HR is used when processing employee benefit information through the Benefits Administration module (e.g., health coverage, life insurance, deferred compensation, etc.). The end result is a bi-weekly paycheck for approximately 38,000 state employees.

Unlike most statewide ERP systems, Delaware processes paychecks for not only all state agencies; but also 19 school districts, 13 charter schools and higher education (Delaware Technical and Community College and Delaware State University). The number of collective bargaining agreements and individual business processes introduced an increased level of complexity (and resulting system modifications) that PHRST continues to address.

## The ERP Service Delivery Team

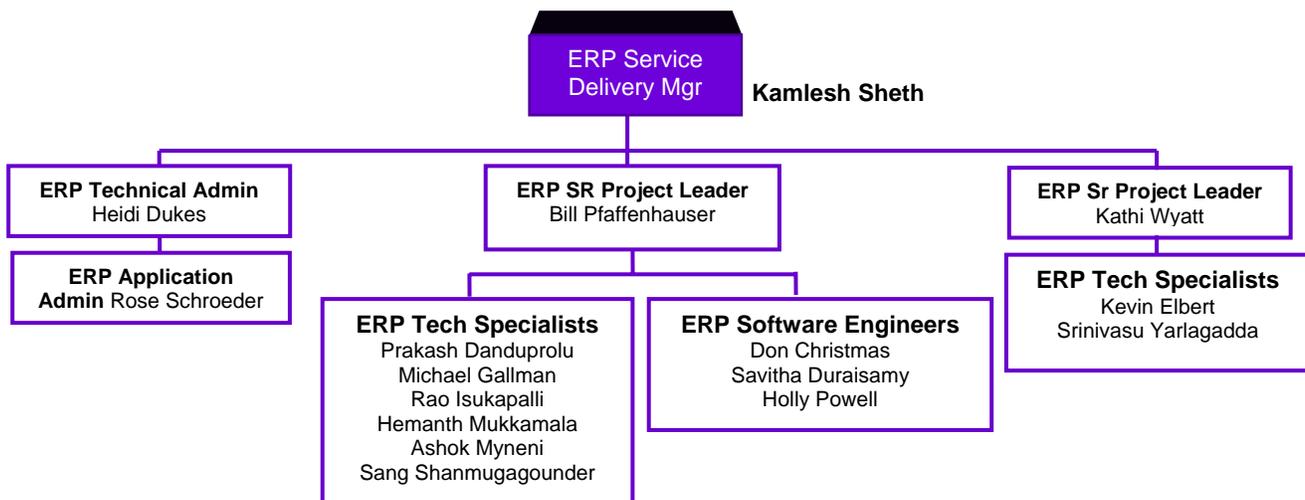
The ERP team consists of a manager, 2 senior project leaders, 11 developers, a PeopleSoft administrator and a PeopleSoft technical lead. Under a normal production environment, these people are responsible for such tasks as:

1. Plan, organize and complete work requests;
2. Maintain production support plan;
3. Analyze and provide solutions to complex functional issues;
4. Apply routine PeopleSoft patches, fixes and tax updates;
5. Write and maintain technical policies and procedures;
6. Maintain synchronization and integration of multiple databases such as:
  - Demo database - contains PeopleSoft delivered functionality;
  - Development database - used for development and unit testing;
  - System Testing database - used for functional and user acceptance testing;
  - Training database - used by State Personnel and Division of Accounting trainers for conducting end-user training.

Currently, all of the prioritized production work efforts have been completed. Except for areas of specialized processing, all ERP production resources have been assigned to various ERP major projects that are underway (see page 6).

*This work was possible because of the excellent support received from PHRST functional teams and DTI's Telecom, Operations and System Engineering teams.*

## ERP Service Delivery Team



## The Office of Major Projects is involved in a wide range of statewide initiatives:



### PHRST Upgrade:

The current version (7.51) is being upgraded to the web-based version (8.8) that will allow for employee self-service for Benefits Open Enrollment next spring. PHRST Upgrade is scheduled to be completed in April 2004.



### Time and Labor:

Currently there are approximately 40 separate time reporting and leave accounting systems in the state. The (phased-in) implementation of PeopleSoft Time and Labor will gradually eliminate these stand-alone systems and allow for standardized reporting of time across the state. Two pilot agencies (Office of State Personnel and Department of Technology and Information) are scheduled for implementation in April 2004.



### Recruitment:

Implementation of a Recruitment application is scheduled for Fall '04. This will include an application with on-line recording and tracking of all recruitment business processes from the request to fill a vacancy through the selection and hiring of a candidate.



### Statewide Financial Reengineering:

Part of the State's 5-year ERP Plan calls for the implementation of PeopleSoft Financials. This system would replace legacy systems such as DFMS, OMS, BACIS and BDIS. In preparation for the implementation of industry best practices, the state must reengineer many of its existing business practices. This project is now in the early planning stages.



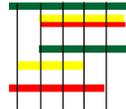
### Pension Upgrade PS8.8:

Upgrade to PeopleSoft v8.8 has been successful and is now operating in parallel mode until "go live" in January 2004. e-Pay module is scheduled for March 2004 implementation. DTI Major Projects provided Project Management support for this effort.



### Courts Organized to Serve (COTS):

This is a new initiative of the Delaware Judiciary aimed at acquiring a new, integrated automated case management system for use by the Courts in partnership with the Delaware Criminal Justice Information System, Department of Justice, Public Defender's Office, Department of Correction and Delaware Bar.



### e-Government:

The e-Government Program consists of over 50 projects that are being tracked for reporting to the e-Government Steering Committee. An automated reporting system (the e-Government Dashboard) has been completed and will, hopefully, be "rolled out" to Business Information Systems Integrators, Project Leaders, Project Managers, and members of the Steering Committee by the end of this calendar year.



### 800MHz Next Generation:

The 800MHz "NextGen" Program consists of several projects that have been identified and are in the Initiation phase. The NextGen Committee, consisting of State Leaders in Fire, Law Enforcement, and Emergency Medical Services, are presently reaching out to their respective communities to collect requirements so the Core Team, led by DTI Major Projects personnel, can develop the comprehensive Program (system) specifications.



### Project "French Vanilla":

Chaired by Lisa Blunt-Bradley, Director of State Personnel (owner of PHRST), this group is committed to reducing the number of modifications and customizations within the PHRST system. To date, there have been some very successful results.

## Kudos to DTI Teams:

Major Projects and PHRST want to convey their appreciation for the System Engineering Team in their effort to make STAT (PeopleSoft version control application) implementation successful. Bud's team and Bill's DBA team did a wonderful job in assisting a successful implementation of the project.

Kudos to Lisa Wragg, Parthiban, Chocks, and Paul Lynch for successfully testing Phase I Disaster Recovery for PHRST.

Major Projects received excellent support and guidance from the Operations Team in identifying the best possible solution for the PeopleSoft Scheduler (Cybermation). Russ, Richelle and many others from Operations worked diligently in creating a solution that will enable the PHRST Upgrade to have a successful implementation. The product will be implemented in mid-January, enabling PHRST to complete system testing on time. Kudos to Richelle Edwards for Cybermation coordination.

Kudos to Tony Collins for his team's on-time performance and completion of the Delaware Helpline project.

The Change Management Team would like to thank the Application Delivery Team for their work on the PHRST Lotus Notes Online Corrections database. PHRST end-users are extremely pleased with this new functionality!!

Change Management would like to thank the Business Office Team for their advice, support and assistance regarding the impending DTI Time & Labor implementation in April 2004.