



Office of Enterprise Initiatives (OEI) TIM Related Project Status ETF Board Meeting September 2013

Jovy Swanton, Director, Project Management Office

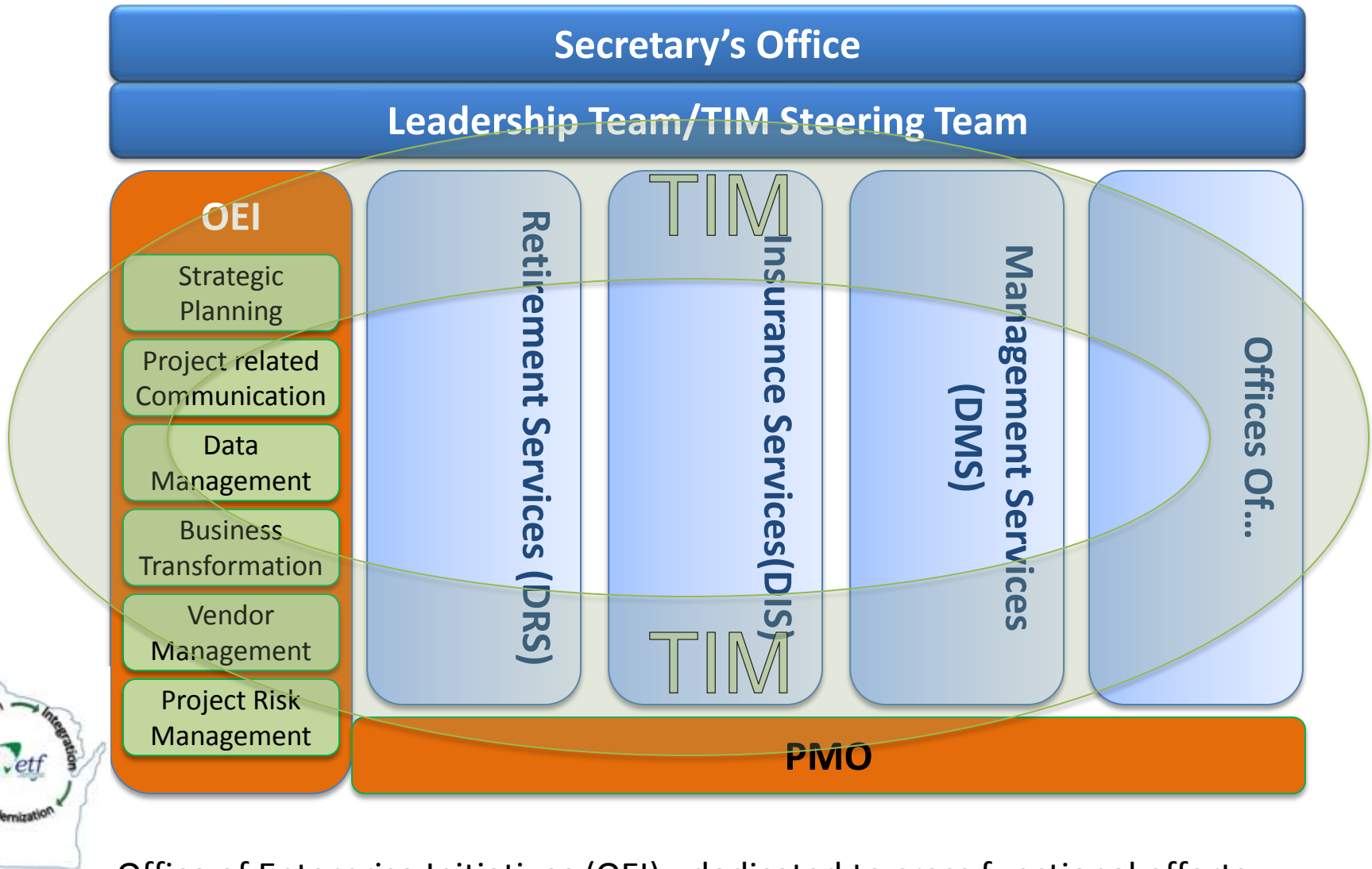
On behalf of:

Bob Martin, Director, Office of Enterprise Initiatives (OEI)

OEI and TIM Project Terminology

- **OEI** – Office of Enterprise Initiatives
- **PMO** – Project Management Office
- **TIM** – Transformation Integration and Modernization initiative “umbrella”

Conceptual Department View



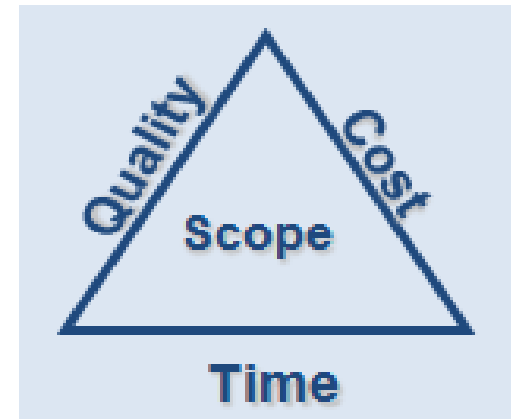
Office of Enterprise Initiatives (OEI) - dedicated to cross functional efforts
Transformation, Integration and Modernization (TIM) – overall “portfolio” of projects

Project Governance

- Governance is one key to successful projects
 - Coordination
 - Communication
 - Fast, reliable decision making
 - Multiple Stakeholders
- Key players dedicated to their project roles
- Separation of duties (e.g. Contract Admin.)
- Similar to what we do for smaller projects

Project Governance

- Oversight
 - ETF Board
 - TIM Steering Team (7)
 - Advisory Groups
 - Contract Administration
 - Other ETF Management/Leadership Teams



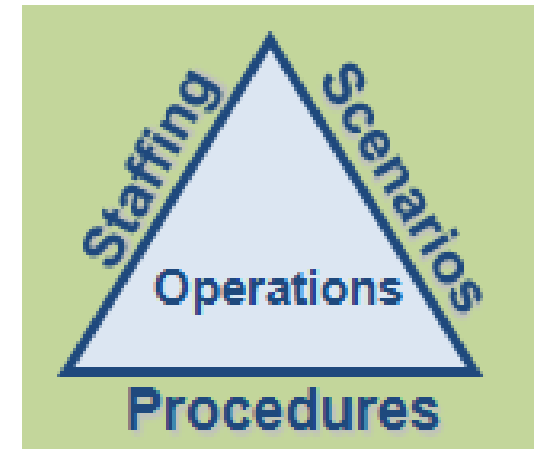
Project Governance

- Core Team
 - Project Management
 - Project Management Team (PMT) coordination
 - Team Leads
 - Business Operations
 - Business Analysis
 - Support
 - Communications
 - Training
 - IT Related Teams

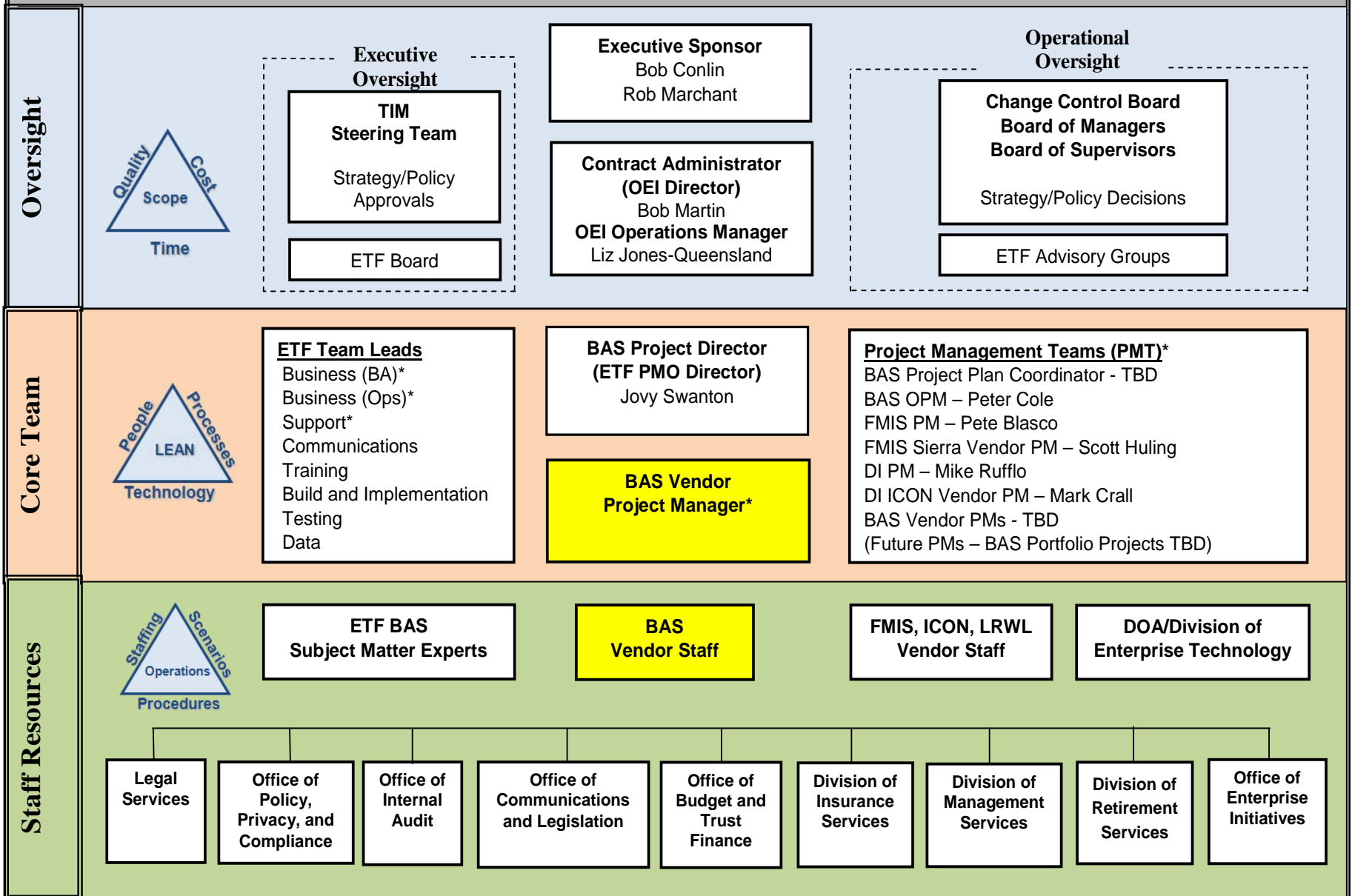


Project Governance

- Staff Resources
 - Full Department representation
 - All levels of the organization
 - Supporting resources
 - Vendor staff
 - Subject Matter Experts (SME's)
 - All ETF employees for requirements input and testing
 - DOA/Division of Enterprise Technology (DET)



TIM PROJECT GOVERNANCE



* = Staff assigned to PMO

OEI/PMO Key Initiatives

- TIM – Transformation, Integration and Modernization
 - FMIS – Financial Management Information System
 - DI - Data Integrity Project
 - BAS – Benefits Administration System
- Day-to-Day Projects – approximately 20 at any one time



OEI/PMO Key Initiatives

- Day-to-Day Projects
 - Approximately 20 ongoing at any one time
 - Operational in nature (e.g. fixes, new legislation)
 - Minimizing number of projects and staff/resources
 - Shifting as many staff resources as possible to TIM



OEI/PMO Key TIM Initiatives

- DI - Data Integrity Projects

- Numerous iterations to clean data:
 - Data profiling
 - Identify/refine business rules
 - What is the best data source to use and how do we ensure the most accurate data?
 - Identify “source” data (a.k.a. one version of the truth)
- Map all current application data to “back-end” databases
- Unify SSN and related changes across applications
- Improve Member ID accuracy



OEI/PMO Key TIM Initiatives

- FMIS – Financial Management Information System (Bob Willett)
 - Phase 1: Plan and Discover
 - Phase 2: Analyze and Design
 - Added Purchasing capabilities to already planned
 - Accounts Payable
 - Accounts Receivable
 - General Ledger
 - Asset Management
 - Next steps:
 - Interface, workflow, report and data conversion designs
 - Finalize design specifications
 - Firm-up project plan (early March 2014 go live date)
 - Phase 3: Configure/Develop



OEI/PMO Key TIM Initiatives

- BAS – Benefits Administration System
 - RFP out and returned on 8/27/13
 - 6 of 8 potential vendors responded – a lot
 - Vendor reviews underway through September
 - Demo's/site visits in October
 - Final evaluation and intent to award mid-November
 - Contract negotiations in November/December
 - Project kick-off with vendor on January 2014
 - Tight timeline due to large number of vendors





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Questions?

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