



# State of Louisiana IT Consolidation

## Project Management Strategy/Resourcing Plan



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## Preface

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The deliverable that follows contains information on the project management and resourcing plan for the new central IT organization. This document provides details of the proposed approach for assigning resources to project based work. These resources will be deployed for specific periods of time to specific projects based on specific skills. These staff primarily reside in the new organization's project management, business analysis, communications and training and application development functions. Whereas these resources are project based, the majority of resources in the new organization will be service-based in their work and will focus on service delivery rather than discrete projects. The focus of this document is on the management of project-based resources. Management of the ongoing service delivery resources is not included in the scope of this document.

# Table of Contents

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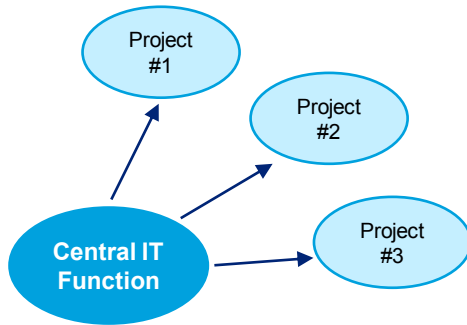
- Overview of Dispatched Resourcing Models
- Current State
- Proposed Approach
- Appendix: Project Resourcing Template

# Overview of Dispatched Resource Models

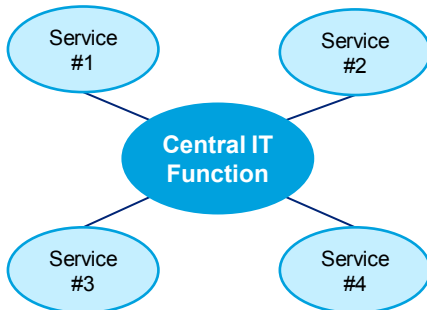
# What is Dispatched Resourcing?

A dispatched or pooled resourcing model uses a group of human resources to provide support to a portfolio of projects. This is different than simply a centralized service provider model that uses a group of resources to provide a suite of specific services. Leading edge organizations use a combination of both models to provide consistent high quality services, as well as focus resources for specific, high priority work efforts. This deliverable focuses on dispatched models specifically, as recommendations and processes for providing centralized service models are described in other deliverables.

## Dispatched Services



## Centralized Service



## Features

- Uses a central pool of staff to deploy to specific projects to provide support
  - Typically embeds resources within project sponsor/host organization
  - Upon project completion, resources are returned to owner organization for redeployment to other projects
  - Owner organization manages deployed staff and tracks staffing metrics such as time and utilization
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- Uses a central pool of resources to provide specific services
  - Resources work within service providing organization
  - Resources remain within the service providing organization regardless of what types of projects are being delivered
  - Owner organization manages service metrics

# Why Use A Dispatch Resource Model?

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A dispatch resource model supports efficient, effective and responsive support for key projects. The model enables the State to support specific projects and priorities. Especially with a constrained human resource environment like Louisiana's, using a pooled model can help the State do more with the resources it has.

## Support Priorities

- Allows the State of Louisiana IT organization to focus on priority projects within a portfolio
- Prioritizes and sequences projects/actions to achieve goals and objectives
- Standardizes processes for managing shared resource pools

## Focus Resources to Complete Projects

- Enables the ability to dial up and down resource level of effort on projects according to need
- Deploys resources for certain phases of projects to help progress without occupying the full work year/work effort of a resource

## Equip projects with Necessary Skills

- Allows for many different types of resources to work on a project, to bring expertise for a given need
- Ensures that experienced staff are working on projects, and that lessons learned are transferred across projects

## Provide Career Opportunities for Staff

- Creates a dynamic work environment for younger staff who may desire more variety in work life
- Enables development and growth for staff in new areas as projects arise

Current State

# Current State Common Themes

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Need based staff allocation is not a new concept for the State. In fact, the State has Liaison and Management consulting job titles, as well as some staff who currently work in a similar model. Given this current state environment, our interviews indicated that the success of the dispatch model was varied across organizations with some departments having organizational structures that hinge on a shared resource pool, whereas other organizations barely use the model at all. The diagram below captures some of the themes of the current state approach.

- **Time tracking** is administratively burdensome – Staff will spend hours tracking and entering timesheets
- There is not a good model or system to capture **resource utilization** for those organizations that do use pooled models.
- Agencies do not have the right **tools** to track usage against budget and plan or when resources will be available after projects end
- **Staff** in the agencies are trained on specific functions or tools and do not have broad knowledge to deliver across projects or technology types



## Current State Common Themes

- **Project and resource planning** is difficult and there is a lot of churn (projects starting and not finishing), because other “more important” projects are identified
- Procurement **timelines** are often unpredictable; sometimes projects must start right away and there is little time to assign resources
- Staff perform **multiple roles** in their day to day jobs and cannot be freed up to work on specific projects
- Staff do not work across agencies and are **siloed** in their domain knowledge



# Current State Details

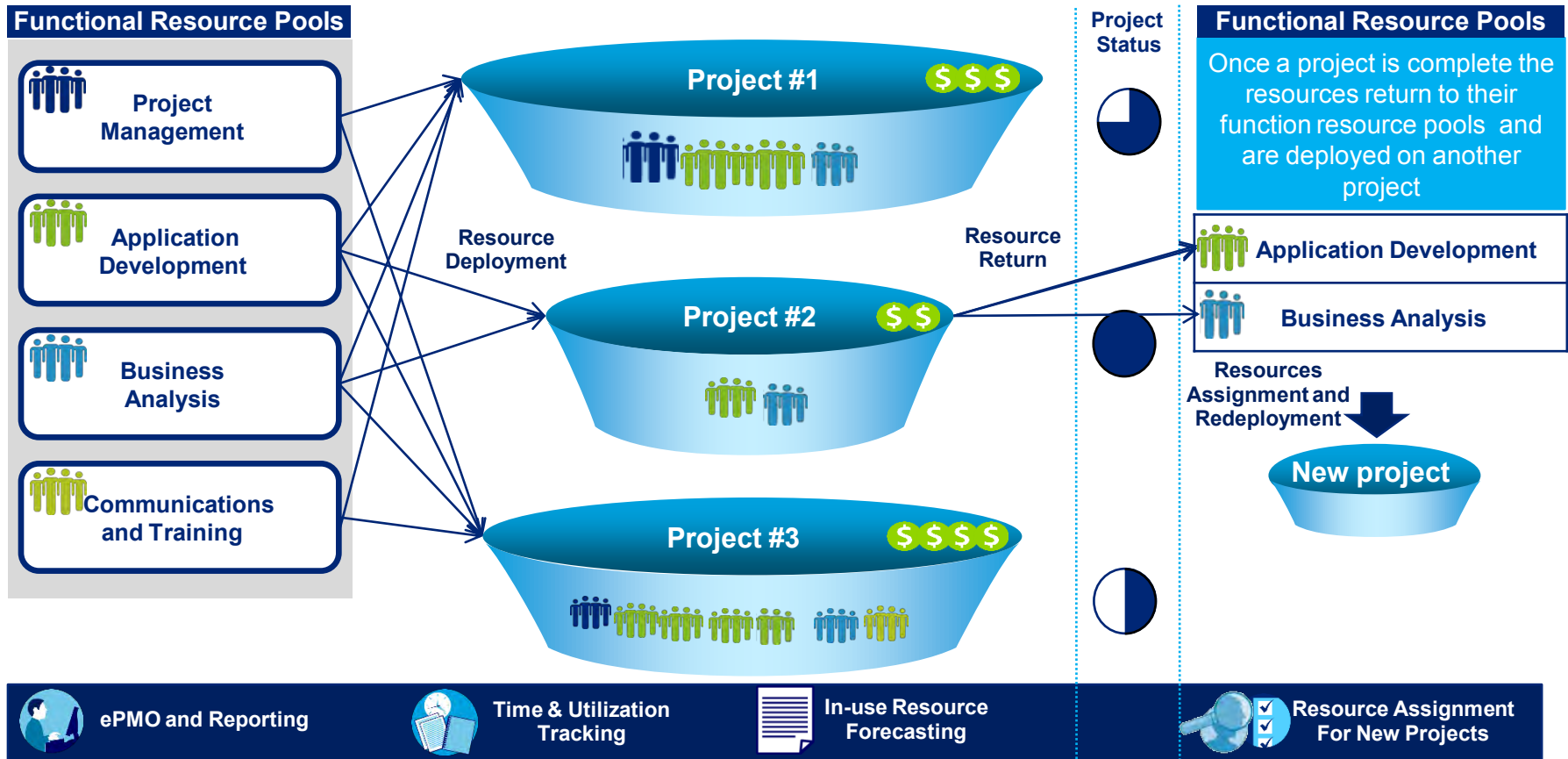
The current approach to pooled resourcing is challenging in many different areas.

Elements	Current State Findings
<b>Existing Models</b>	<ul style="list-style-type: none"> <li>Resources work for an agency and have functional expertise of the business processes for that agency</li> <li>It is difficult to utilize personnel from other agencies on short-term projects due to the ramp-up time required to familiarize staff with agency and functional specifications</li> <li>Shared resourcing is often impractical at the agency level and is rarely done</li> <li>Agencies that use shared resource models often lack qualified, cross-trained resources for projects</li> <li>Shared resource pools do work well for standard technologies such as desktop and technical services</li> <li>Utilization of common processes for resource management is limited within both the individual agencies and OIT</li> </ul>
<b>Planning and Management</b>	<ul style="list-style-type: none"> <li>The ePMO is in process of being established</li> <li>Within agencies, there are few formal PMO processes; temporary management is often utilized for larger projects</li> <li>Resource assignment for shared projects is ad-hoc and there is little resource forecasting or planning</li> <li>Resource planning that does take place at the agency level is not typically a centralized PM function</li> <li>There is little forecasting process or standard resource management process</li> <li>According to survey data, only 18 of 29 agencies have an IT staffing plan</li> <li>According to Core Team members, resources are “always” over-allocated</li> </ul>
<b>Human Capital Management/ Deployment</b>	<ul style="list-style-type: none"> <li>There are no knowledge transfer programs in place that would cross-train resources on the functional and technical skills that dispatched resource pools need to be productive in a shared environment</li> <li>There is a decentralized approach to organizing and managing resources and duplicate functions across agencies</li> <li>Agencies do not have insights into the staff and skills at other agencies so that they can share resources</li> </ul>
<b>Supporting Technology and Tools</b>	<ul style="list-style-type: none"> <li>There is disparate use of tools utilized by agencies for resource coordination, tracking and management projects, and general project and task management across projects;</li> <li>Many different tools are used: MetaStorm, MS Project and MS Server, AtTask, physical one-sheet planning boards</li> <li>These tools are administratively burdensome and do not provide the standard reports needed to analyze projects</li> </ul>

# Proposed Approach

# Proposed Model

In the proposed model - Project Management, Business Analysis, Application Development and Communications and Training Functions will employ a dispatch staffing model (implementation dates to be determined). These pooled resources will be assigned to specific projects taking place across the IT landscape for specific periods of time and then redeployed as those projects end. Functions not using a dispatched model, will use a centralized services approach.



\$ Minimum Budget Threshold

# Implementation Activities

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In moving from the current state to the proposed dispatch model, the new central IT organization must consider the impacts to staffing, technology and processes.





# Staffing

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In the future state resource management model, shared resource pools will be utilized to support a consolidated IT organization and address project management needs for IT projects.

## Key Staffing Considerations

### Determine staff for model

- Conduct standard skills/knowledge assessment of staffing groups to ensure alignment with needs of dispatch model and identify training needs

### Identify resourcing/ deployment staff

- Identify deployment staff to manage the pool of resources, assign resources to new projects, track resource skill sets, manage forecasting to identify when resources will become available. These staff will be part of the IT Portfolio Management group (See Organization Model Deliverable)

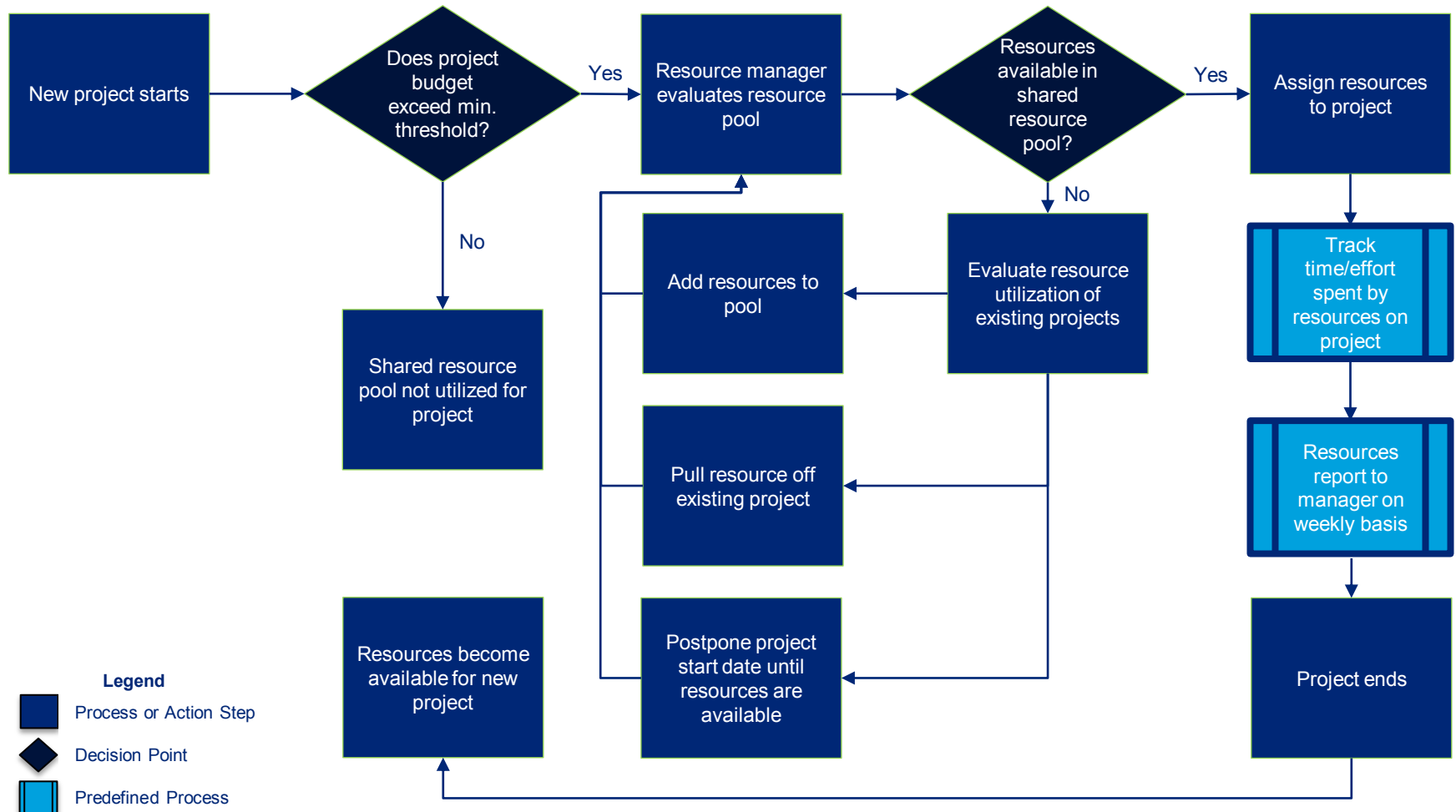
### Define roles and responsibilities

- Develop roles and responsibilities including key job duties and reporting relationships as well as the reporting process and cadence between resources and resource deployment staff



# Process

A process and decision criteria for dispatching staff will support tracking of resource utilization and allows project managers to know when resources will become available for new project.





# Technology

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A standard, easy-to-administer technology tool set should be implemented to support the model. The tools selected should meet the requirements below.

## Key Requirements

- **Establish and track project codes**—Project codes are unique identifiers for projects. LAGov system can be used to set up project budgets with project codes so that budget to actuals can be measured.
- **Project-based time tracking**—Centralized tool for tracking work hours to projects (time-tracking capabilities)
- **Reporting**—Ability to create reports to show actual budgets/man-hours to estimates
- **Forecasting**—Mechanism for tracking when shared resources roll off of projects and move back into the shared resource pool; See Appendix: Project Resourcing Template for more information on resource tracking and forecasting

# Implementation Transition – Other Considerations

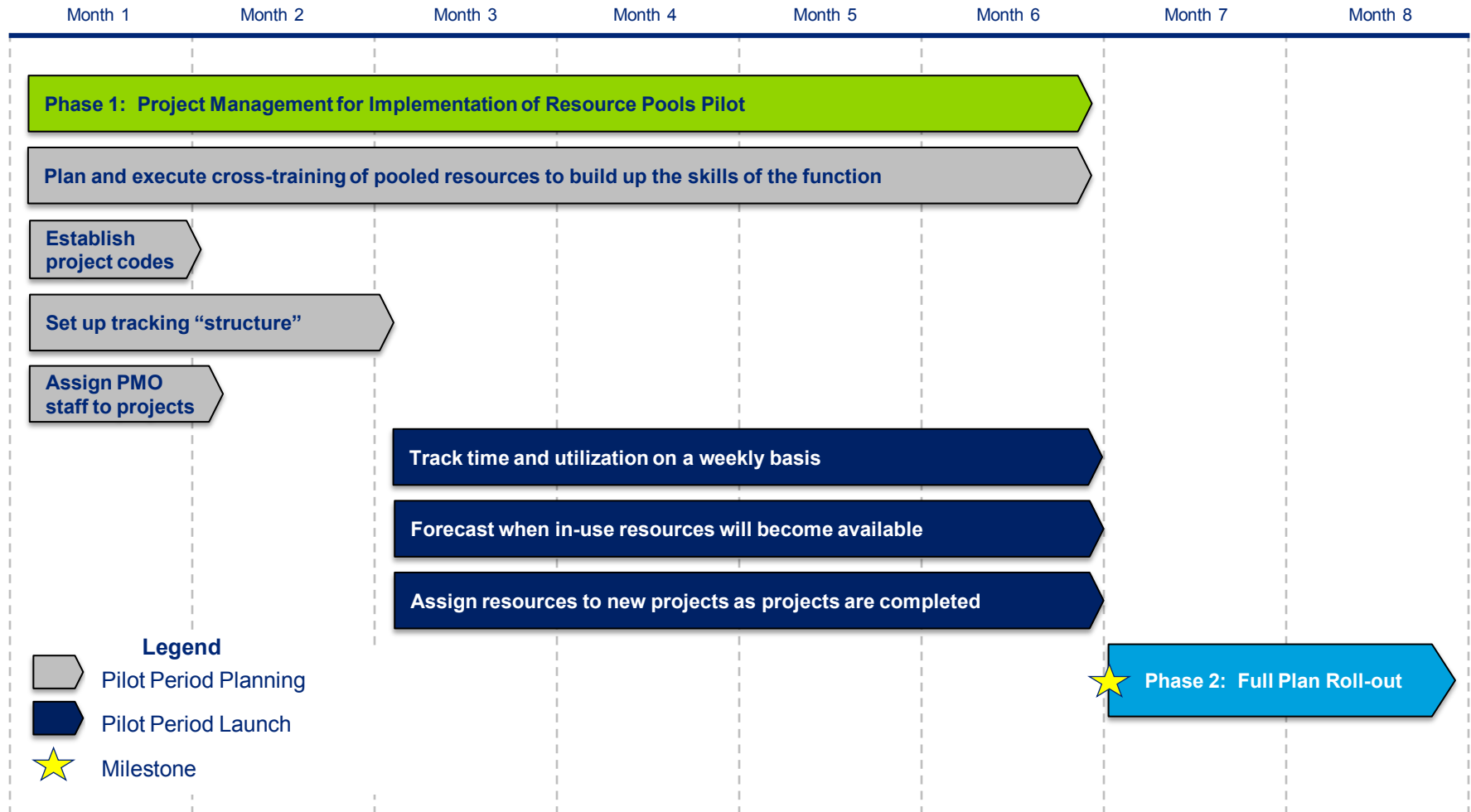
In addition to implementing the staffing model, process and technology to support the future state, there are other activities needed to make the implementation successful. A plan for training, governance, communications and change management are critical components to the implementation of the model.

Activities	Description
Training and Knowledge Transfer	<ul style="list-style-type: none"> <li>• Identify skill sets of staff within resource pool to plan training needs</li> <li>• Develop cross-training plan for functional knowledge sharing within the shared resource model to spread the knowledge of agency business across the centralized organization</li> <li>• Educate staff and management on the staffing approach and supporting processes</li> <li>• Plan for the pilot of PMO resources into the new organization structure</li> </ul>
Resource Management	<ul style="list-style-type: none"> <li>• Establish a cadence of weekly project management meetings to review staff availability and needs</li> <li>• Create reporting templates with staff availability, utilization rates and forecasting</li> <li>• Manage the number of shared resources against demand and build staffing models</li> <li>• Eliminate churn through portfolio management</li> <li>• Establish management expectations of resource management administrative requirements</li> </ul>
Change Management Plan	<ul style="list-style-type: none"> <li>• Communicate with stakeholders about how the new organization will work and support their needs</li> <li>• Follow the Change Management Plan process to transition staff into their new roles</li> <li>• Pilot a roll out to incorporate lessons learned into full implementation</li> <li>• Leadership should assess the organization readiness after the pilot and before the full rollout occurs to identify and address concerns before the transition</li> </ul>

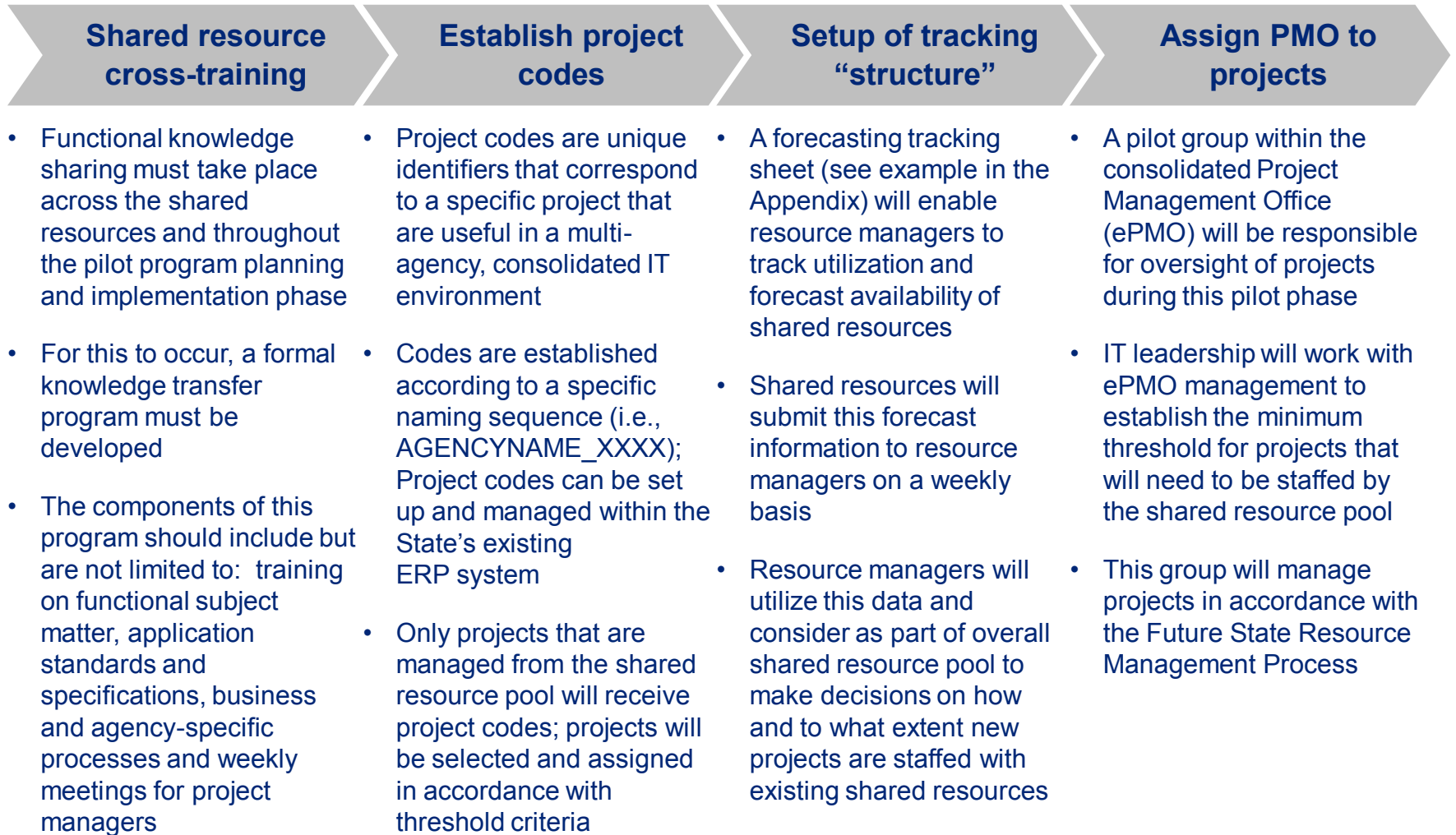


# Proposed Implementation Sequence

A sequence of activities will support implementation of the model. These activities include the development of a pilot group within the ePMO, the establishment of tasks and tools for resource management, and the subsequent roll-out of the full model across the consolidated organization.



# Pilot Period Implementation Considerations – Planning



# Pilot Period Implementation Considerations – Launch

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## Time and utilization tracking

- Shared resources will enter their time spent on projects on a weekly basis via time tracking system identified as part of Gap Closure activities in transitioning to the Future State resourcing model
- Primary purpose of time tracking system is to compare actual hours expended versus budgeted hours/cost, and to help project managers both drive efficiencies and manage resource utilization across a given project
- Management will review time reports on a regular basis to make sure staff are entering their time reports accurately
- Administrative project codes will be managed closely, with the goal to have staff work on project to meet the agencies needs

## In-use resource forecasting

- Resource managers will utilize data submitted by shared resources via Forecasting Tracking Sheet to identify when each resource will become available for new projects
- As information is submitted on a weekly basis, resource managers will be responsible for considering the utilization and projected end dates of all shared resources in order to forecast resource availability dates, and project start dates
- Reports will be created for management to understand the current unassigned resources and projected availability for the next month and into the future

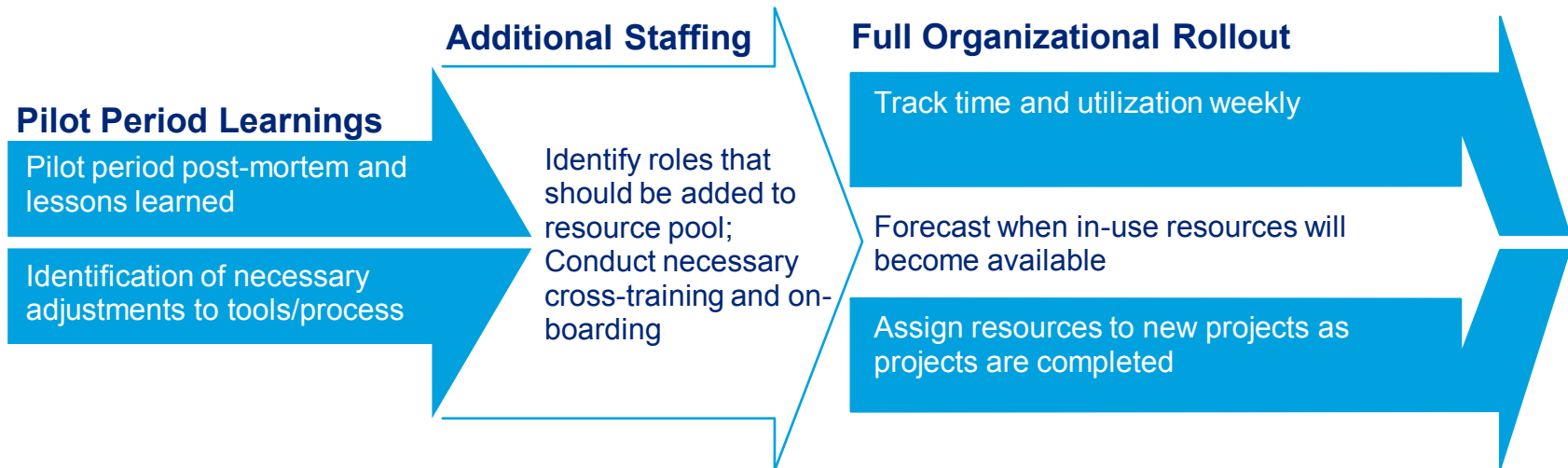
## Resource assignment for new projects

- Through in-use resource forecasting, resource managers are able to identify resources for new projects from the resource pool and structure project start dates in accordance with availability
- This activity is meant to run in parallel with in-use forecasting, time and utilization tracking as each is dependent on one another for efficient and effective resource management throughout the pilot period
- Staff will work with their resource managers to plan their next projects as their current projects are ending
- Resource managers will report to OIT leadership when new projects start and resources are assigned

# Full Rollout Considerations

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- At the conclusion of the pilot period, IT should incorporate any lessons learned or stakeholder feedback into the process and procedures, and make any necessary adjustments
- OIT should use the same steps as outlined within the pilot period as it expands the pilot program to other roles as the standard resourcing model within the consolidated IT organization



# Appendix: Project Resourcing Template

# Sample Forecasting Tracking Sheet

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First Name	Last Name	Job Title	Current Project(s)	Hours per Week	Project Start Date	Project End Date	Project Job Code
John	Doe	Project Manager	DCFS Project A	20	1/15/2014	6/30/2014	DCFS01234-01-01-0000
			DOTD Project G	15	12/15/2013	3/31/2014	DOTD01234-03-02-1000

- On a weekly basis, staff fill out the above information and send to the resource managers.
- Resource managers consolidate forecasts, develop reports and provide information about when new projects can start.