

# Technology Services Board Quarterly Meeting WebEx Only

June 9, 2020

9:00 a.m. - 11:00 a.m.



WA • Office of the

**Chief Information Officer**

# AGENDA

TOPIC	LEAD	PURPOSE	TIME
Welcome and Introductions	Jim Weaver	Introductions	9:00
Approve Minutes from March 10 Meeting	Jim Weaver	Approval	9:04
<b>Project Status – Office of Financial Management’s One Washington Program</b> <ul style="list-style-type: none"> <li>• Tracy Guerin, Acting Executive Sponsor</li> <li>• Vann Smiley, Program Executive Director</li> <li>• Thomas Ortiz, ISG-P</li> <li>• Lizzy Drown, PMO Manager</li> <li>• Emily Poyner, OCM Director</li> <li>• Jennifer Rocks, Deloitte</li> <li>• Allen Mills, QA, <i>bluecrane</i>™</li> </ul>	Sue Langen Laura Parma	Project Status	9:05
<b>Project Status – WSDOT Tolling Back Office System Replacement Project (BOS)</b> <ul style="list-style-type: none"> <li>• Patty Rubstello, Asst. Secretary and Executive Sponsor</li> <li>• Jennifer Charlebois, Project Manager</li> <li>• Dana McLean, QA, Public Consulting Group</li> <li>• Yvonne De La Rosa, Public Consulting Group</li> <li>• Heather Coughlin-Washburn, Public Consulting Group</li> </ul>	Sue Langen Rich Tomsinski	Project Status	9:35
<b>Project Status – State Board for Community &amp; Technical Colleges - ctcLink</b> <ul style="list-style-type: none"> <li>• Jan Yoshiwara, Director and Executive Sponsor</li> <li>• Christy Campbell, Project Director</li> <li>• Grant Rodeheaver, Chief information Officer</li> <li>• Paul Giebel, QA, Moran Technology</li> </ul>	Sue Langen Rich Tomsinski	Project Status	10:05
Public Comment			10:35

# Current TSB Members

## Industry Members

Butch Leonardson – Retired CIO

Paul Moulton – Costco

## Legislative Members

Rep. Matt Boehnke – House R

Rep. Zack Hudgins - House D

Sen. Patty Kuderer – Senate D

Sen. Ann Rivers – Senate R

## Executive Branch (Agency Directors)

Jim Weaver – State CIO & Chair

David Danner – UTC

Tracy Guerin – DRS

Vikki Smith – DOR

## Other Government

Viggo Forde – Snohomish County

Members present

Members absent

06/09/2020

# Welcome/Introductions/Approve 03/10/2020 Minutes

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# Project Update – OneWA

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06/09/2020

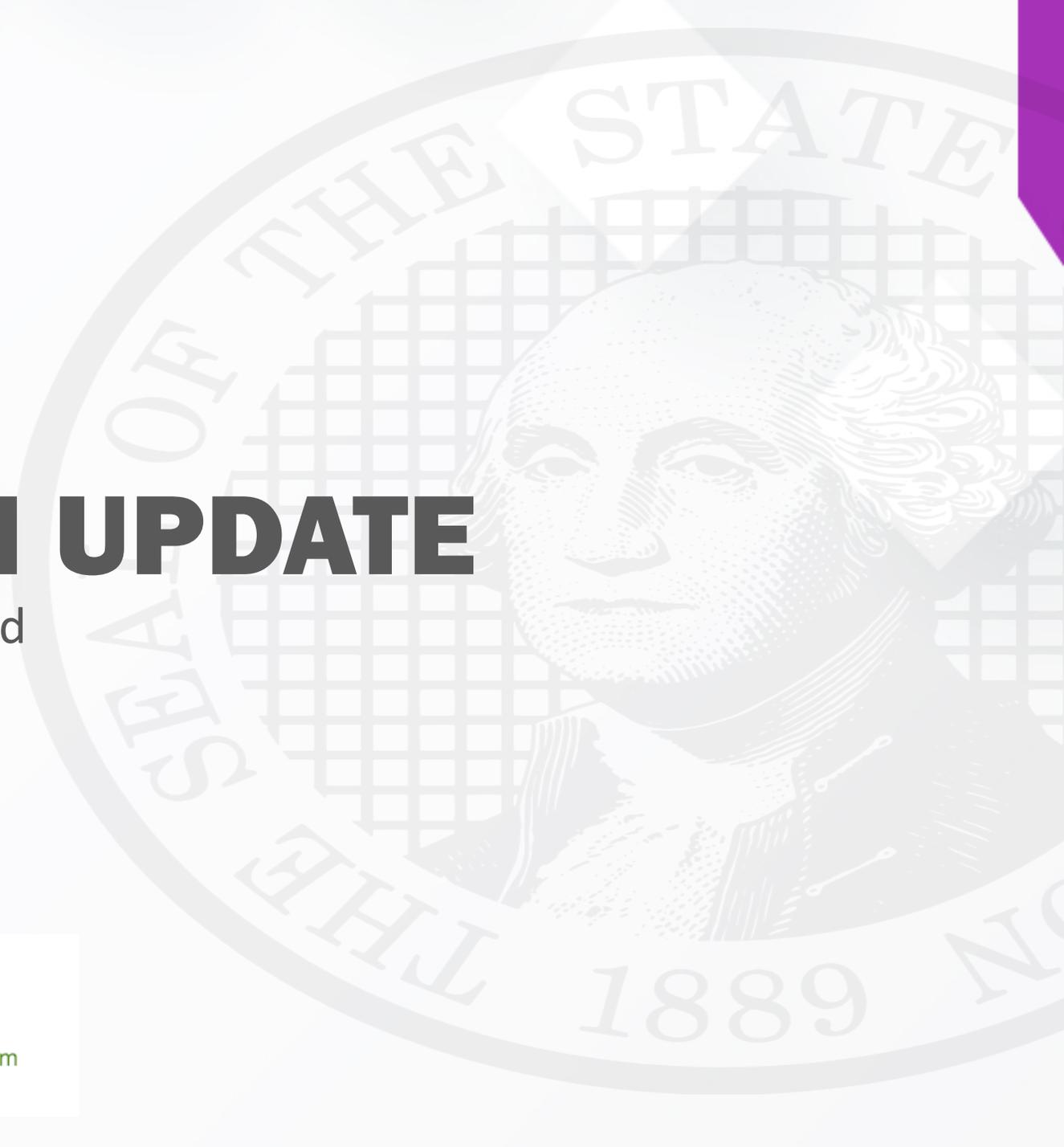
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June 9, 2020

# PROGRAM UPDATE

Technology Services Board



**One Washington**  
 A Business Transformation Program

# Agenda

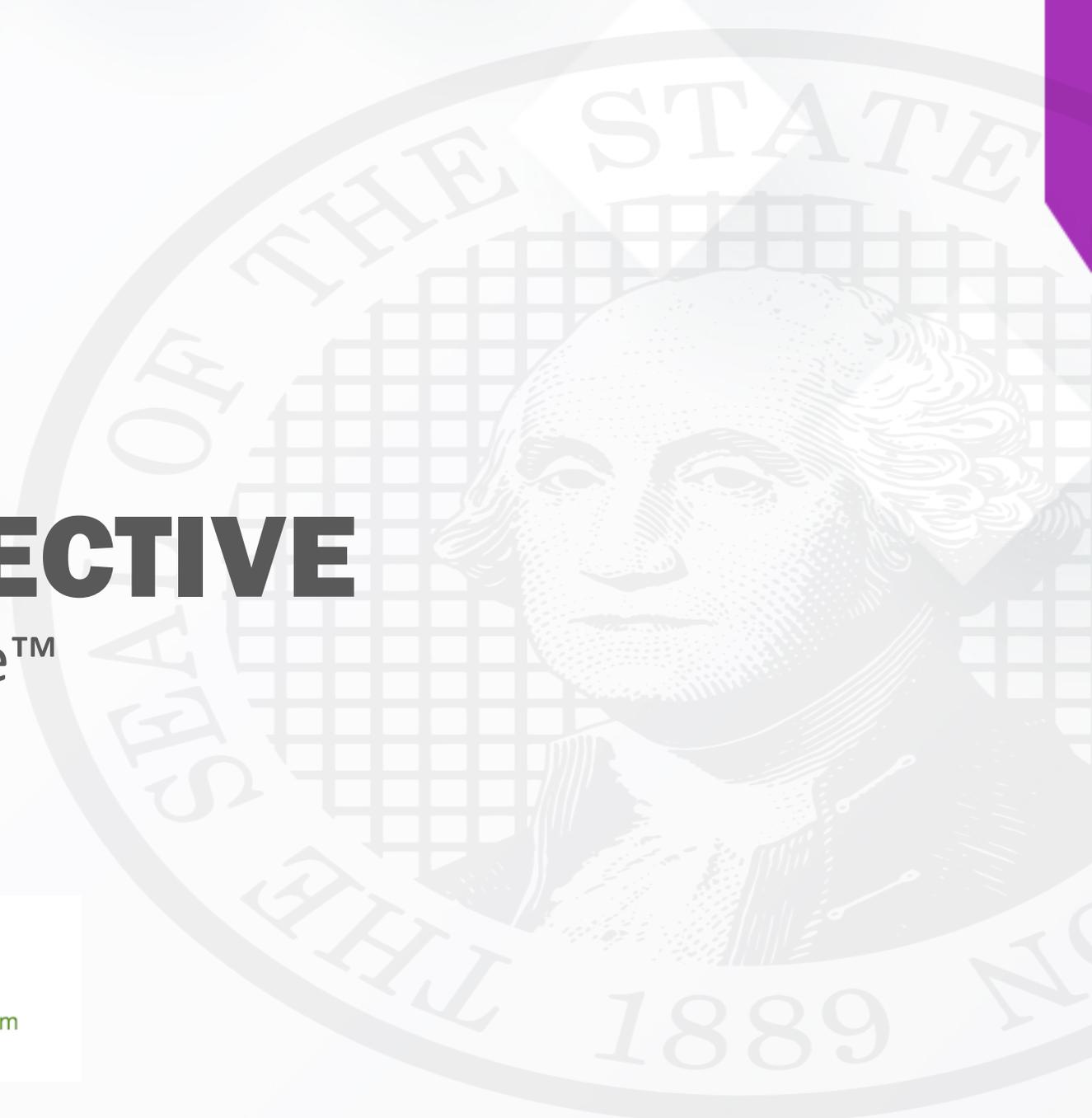
- Welcome
- QA perspective
- Brief scope and schedule discussion
- Refinements to project since December
- Organizational change management update
- Wrap-up & questions

# QA PERSPECTIVE

Allen Mills, bluecrane™



One Washington  
A Business Transformation Program



# Critical Risks and Program Responses Over the Past 6 Months

Risk Area	Risk	Program Mitigation
<b>Agency Readiness</b>	If agencies do not understand what resources, skills, and time commitments are needed, then the Program's timeline is at risk	<ul style="list-style-type: none"> <li>• Workshop meetings with individual agencies</li> <li>• Business Process Mapping</li> <li>• Progress on Integrations and Data Conversion</li> <li>• Detailed Organizational Change Management planning and execution</li> <li>• Agency Support Team approach underway</li> <li>• Requirements reviews</li> <li>• Program working with WaTech and OFM to monitor IT requests for duplicative/overlapping content and scope</li> </ul>
<b>Scope and Schedule</b>	If the Program does not rapidly adjust to its approved Supplemental Budget, then the Program's scope and/or timeline is at risk	<ul style="list-style-type: none"> <li>• "Purchase-to-Pay" functionality moved to Phase 1B (without reducing overall scope of the Program)</li> <li>• Program reevaluating professional services contracts and FTEs</li> </ul>
<b>Staffing</b>	If the Program does not rapidly adapt its recruiting, hiring, and on-boarding approaches for the 100% remote work environment, then the Program's timeline is at risk	<ul style="list-style-type: none"> <li>• Program developing Remote Work Plan</li> <li>• Hiring and onboarding tasks incorporated into schedule</li> <li>• Detailed on-boarding procedures developed</li> </ul>
<b>Governance</b>	If the Program does not have a governance structure that facilitates rapid decision-making at an enterprise level, then the Program's timeline is at risk	<ul style="list-style-type: none"> <li>• Program continues to organize and engage governance structures for policy, processes, and configuration decisions</li> <li>• UW workshop clarified the importance of a well-structured governance framework for quick and decisive decision-making</li> </ul>

## Looking Forward – Top Areas of Focus for Risk Analysis

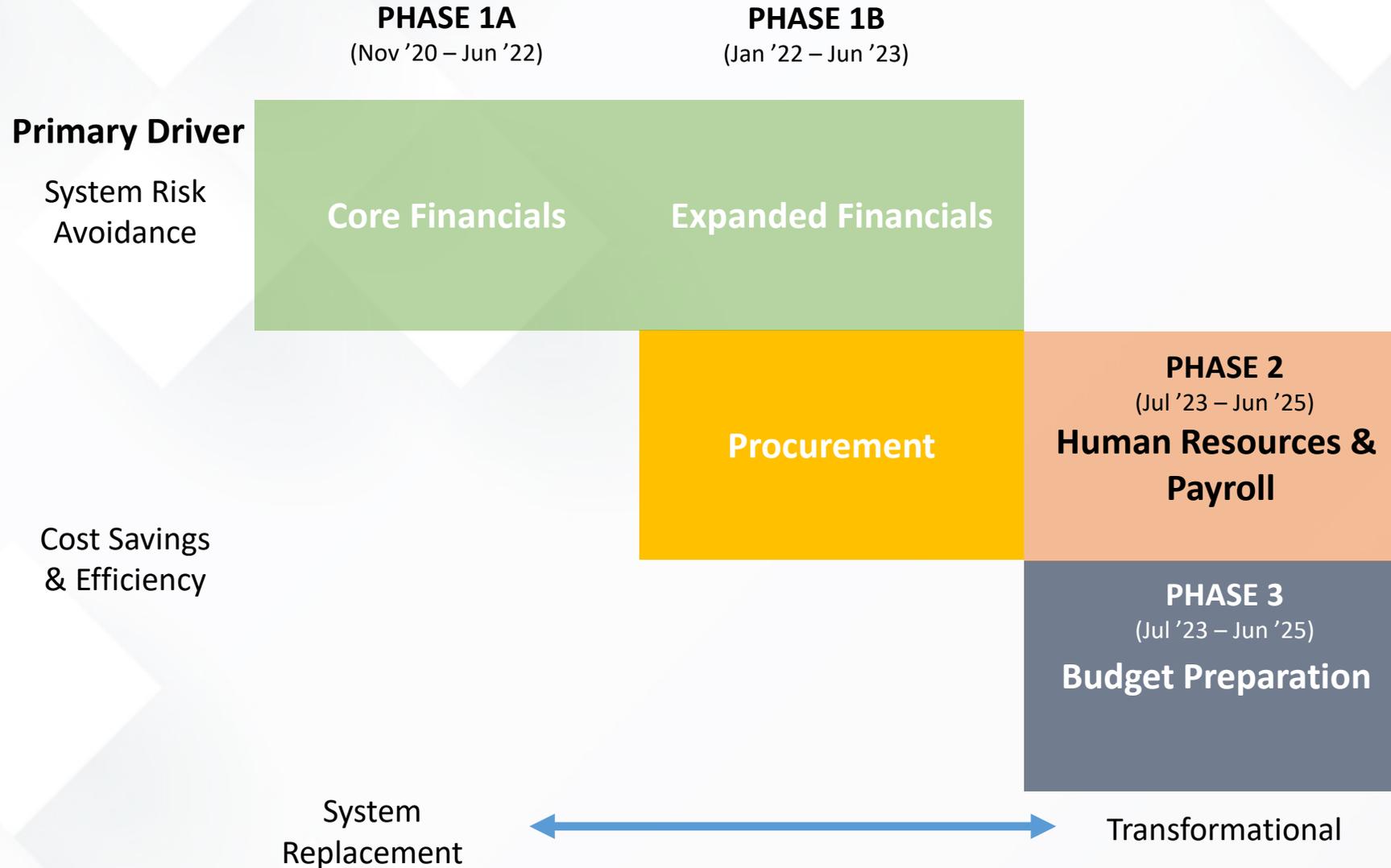
- **Agency Readiness** – will continue to demand significant time from Program for mitigation through collaboration
- **Software and SI** – Impending announcement of ERP software selection and subsequent release of SI RFP are critical milestones for keeping the Program on-schedule
- **Recruitment, hiring, and on-boarding** - must move forward in a challenging work environment
- **Development of DP** – budget-related documents will require substantial staff time
- **Continuing refinement of governance** – emphasis should be on rapid decision-making
- **Priorities of effort** – Program staff must identify and execute the most essential and highest priority work
- **Remote work environment** – Program must continue to monitor effectiveness of remote work environment and health of staff

# REFINEMENTS IN THE PROJECT SINCE DECEMBER 2019

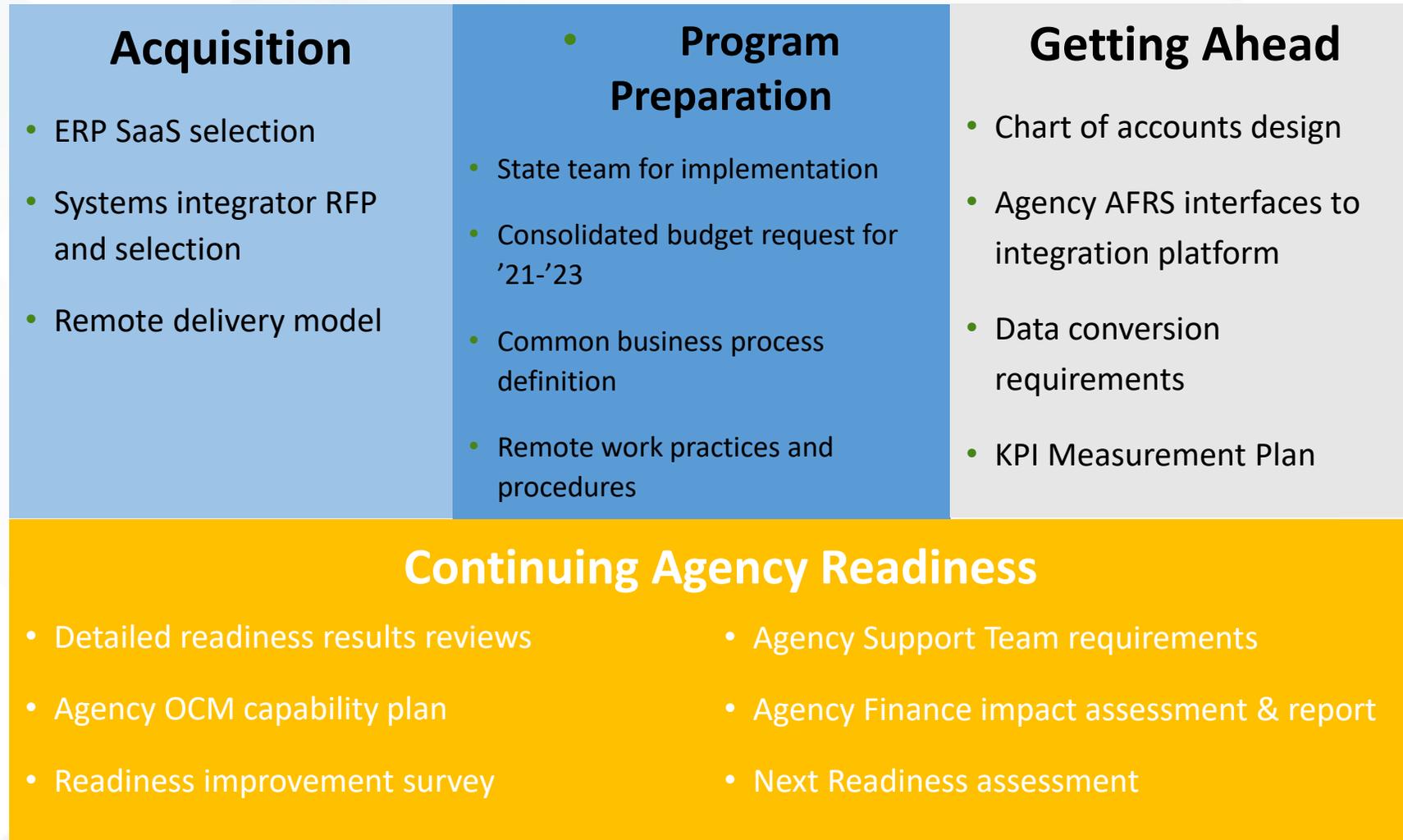


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# Scope & Schedule Discussion



# Preparing for the Implementation



# Key refinements since December 2019

- **Compromise supplemental budget**

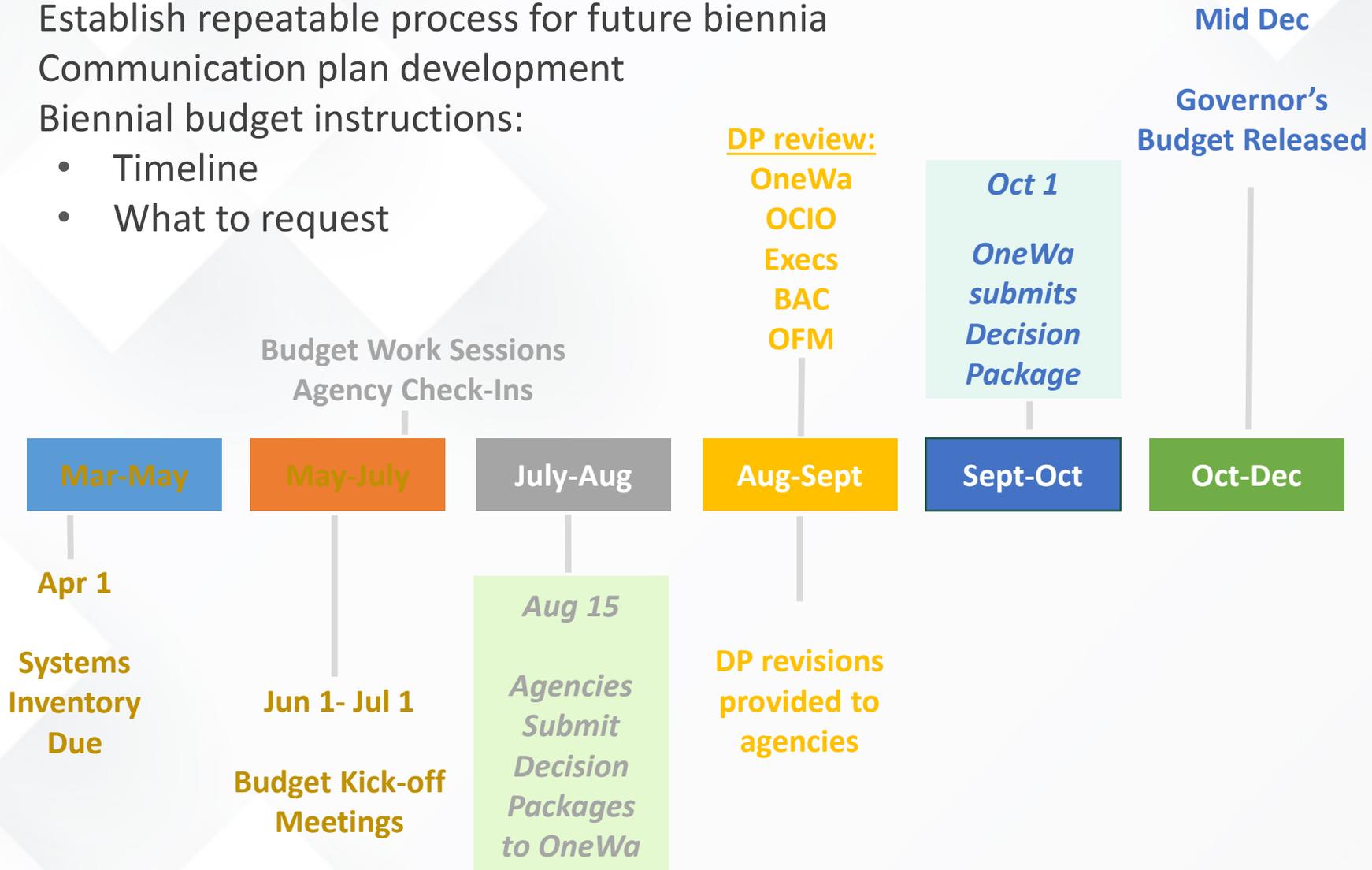
- One Washington: \$20.065M (originally requested \$25.525M)
  - 10 FTEs including 1 for Statewide Accounting.
- State HR: No supplemental funding
- WSDOT: \$1.2M (includes 1 FTE)

- **Overall project scope and timeline are not impacted**

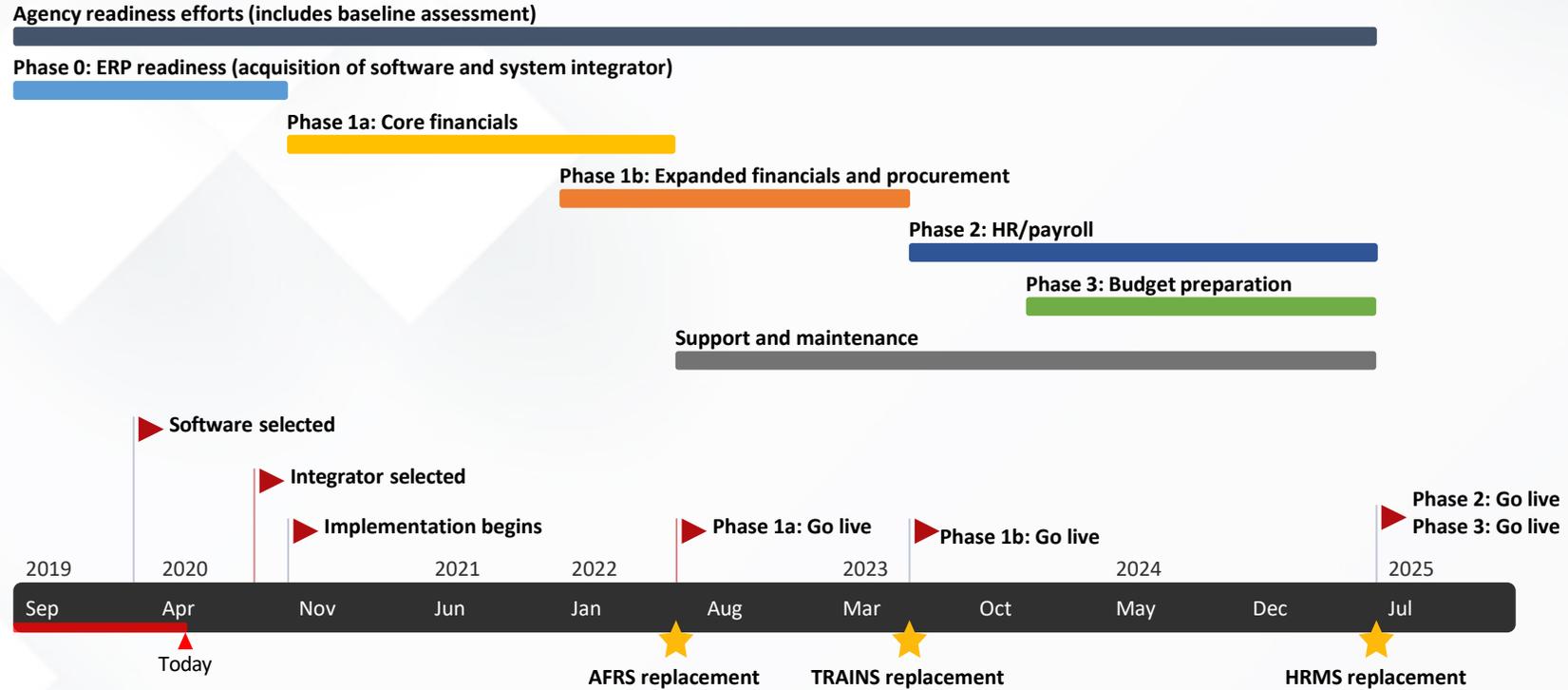
- Phase 1A focused on Core Financials (AFRS replacement)
- Postponed implementation of Purchase to Pay to Phase 1B

# 2021-23 Budget Preparation and Timeline

- Establish Budget Advisory Committee (BAC)
- Complete build of process and sub-project plan
- Establish repeatable process for future biennia
- Communication plan development
- Biennial budget instructions:
  - Timeline
  - What to request



# Modernization Roadmap



(calendar year view)

Planning in partnership with enterprise function owners: OFM Statewide Accounting, Department of Enterprise Services, OFM State HR and OFM Budget Division. The plan is subject to 1) funding approval and 2) anticipated adjustments after the system integrator is onboarded early fiscal year 2021.

5/19/2020

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# **BENCHMARKING SURVEY - FINANCE**



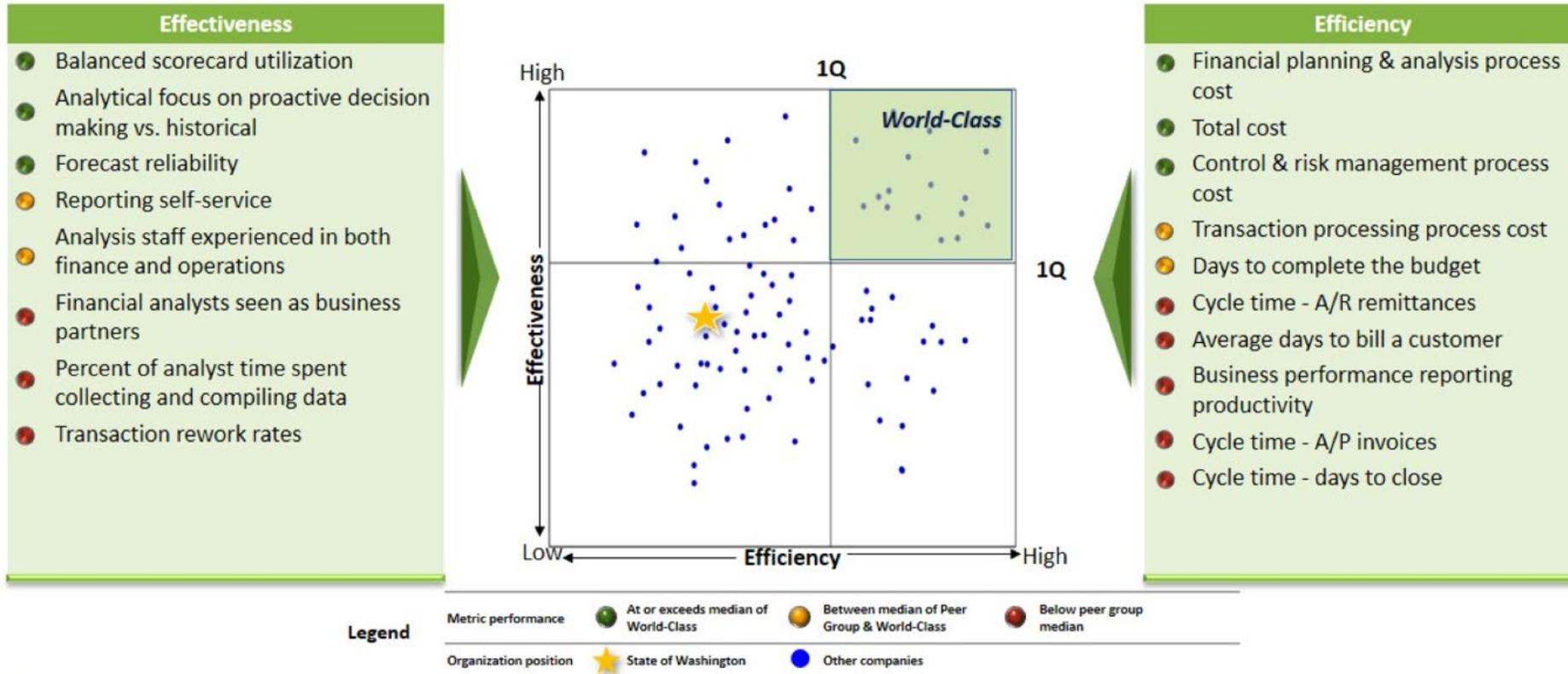
One Washington

A Business Transformation Program

# Benchmarking Report: Value Matrix

State of Washington has opportunities to reach higher levels of efficiency and effectiveness

## Hackett Value Grid™



The Hackett Group

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# Benchmarking Report: Executive Summary

## Summary Benchmark Findings

- Washington process costs (labor + outsourcing) are lean relative to Peers and World-Class organizations, driven by low FTE counts and labor rates
- While costs are low, key opportunities to leverage leading tools and practices exist to improve information and service delivery to the State
- Processes are highly fragmented, driving low standardization and highlighting significant opportunities to centralize and standardize
- Stakeholders highlighted significant improvement opportunities in business partnering and technology
- Perceived lack of Finance and Accounting expertise across state agencies
- Low overall use of automation in transactional areas
- High degree of application complexity across all processes as a result of home grown systems within agencies and variability tools

## Key Recommended Actions

1. Drive centralization of core processes where there is skill / scale benefit (e.g., AP, Reporting / Data Management) to improve Service Delivery to the State
2. Centralize Finance Technology Management; define / drive a Finance Systems Roadmap from immediate automation opportunities (e.g., RPA in close / reporting) through broader system consolidation (where benefit dictates)
3. Enact Talent Management program to address identified gaps to ensure appropriate skill sets and capabilities of Finance team to drive Future State operating model and provide improved partnership

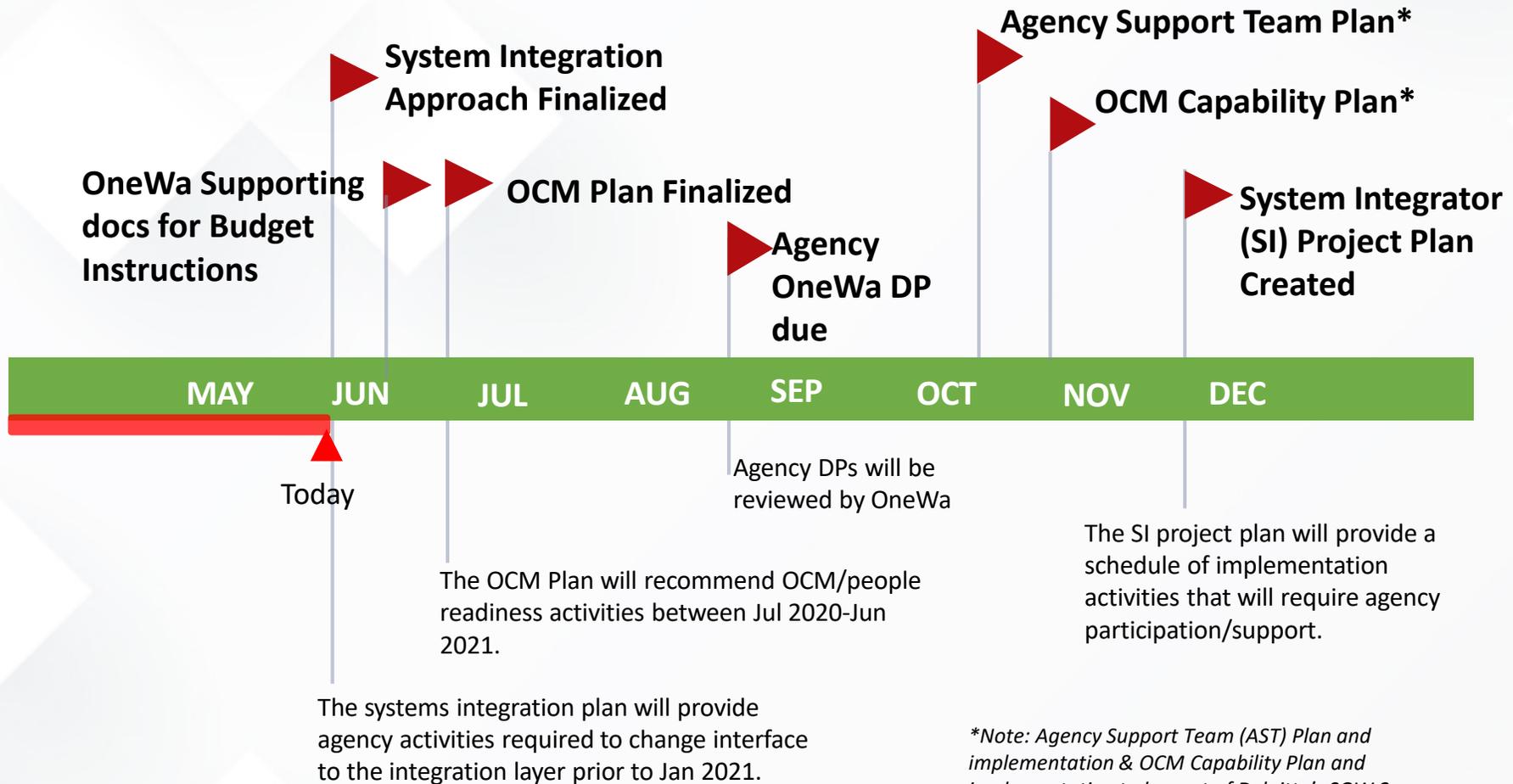
# ORGANIZATIONAL CHANGE MANAGEMENT (AGENCY READINESS)



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# Key Program Milestones related to Agency Readiness

The program milestones below will provide additional details on agency activities and workload required to support OneWa. The following slides will be updated as more information on program and agency readiness becomes known.



*\*Note: Agency Support Team (AST) Plan and implementation & OCM Capability Plan and implementation to be part of Deloitte's SOW 2*

# Sample Agency Scorecard

**2,293**

Agency Headcount (Large)

**57/50**

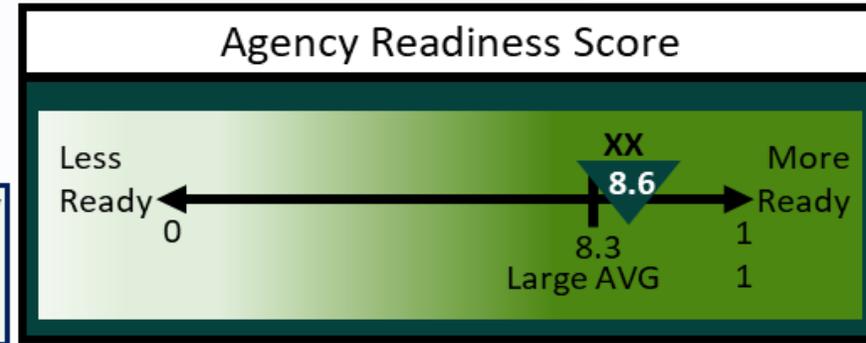
Survey Responses / Target Responses

Agency Representation

ESC  BTB  Advisory Committees

OCM Capacity

Medium



### Agency Technology Readiness

Criteria	Score	Normalized Score
Completeness of IT Systems Inventory	High	3
# of Systems Replaced by ERP	2	3
Ease of Change	Med	2
Data Conversion Method	Auto	2
IT Staff in Place to Support Implementation	High	3

**AVG: 2.6**

Large Agency AVG: 2.5

# Initial Agency Readiness Scores

The tables on the next two slides illustrate the average readiness scores for all large, medium, and small agencies (not including DES-Supported agencies which are shown on a later slide).

AGENCY	AGENCY SIZE	RESPONSE RATE	READINESS SCORES			
			PEOPLE (1-4)	PROCESS (1-4)	TECHNOLOGY (1-3)	TOTAL (1-11)
Department of Financial Institutions	Medium	8 / 5 (160%)	3.3	3.3	3	9.6
Department of Retirement Systems	Medium	5 / 5 (100%)	3.3	3.2	2.8	9.3
Office of the State Auditor	Small	5 / 5 (100%)	3.4	3.2	2.6	9.2
Treasurer, Office of the State	Small	2 / 5 (40%)	3.3	3.1	2.6	9
Health Care Authority	Large	45 / 25 (180%)	3.2	3.2	2.6	9
Liquor and Cannabis Board	Medium	6 / 5 (120%)	2.9	3	3	8.9
Employment Security Division	Large	3 / 25 (12%)	3	3.1	2.8	8.9
Office of Financial Management	Medium	21 / 5 (420%)	3.1	3.1	2.6	8.8
Department of Revenue	Large	4 / 25 (16%)	3	3.3	2.4	8.7
Washington State Patrol	Large	57 / 50 (114%)	2.9	3.1	2.6	8.6
Department of Labor and Industries	Large	43 / 50 (86%)	2.9	2.9	2.8	8.6
Department of Enterprise Services	Medium	25 / 25 (100%)	3.2	3	2.4	8.6
Utilities and Transportation Commission	Small	2 / 5 (40%)	3.1	3.1	2.4	8.6
State Investment Board	Small	6 / 5 (120%)	3.1	3	2.4	8.5
Attorney General, Office of the	Large	12 / 25 (48%)	2.8	3.1	2.4	8.3
Department of Health	Large	45 / 25 (180%)	2.9	2.7	2.6	8.2
Washington Technology Solutions	Medium	27 / 5 (540%)	2.8	2.9	2.4	8.1
Department of Fish and Wildlife	Large	33 / 25 (132%)	2.8	2.8	2.5	8.1
Department of Corrections	Large	47 / 50 (94%)	2.9	2.9	2.2	8
Department of Veterans Affairs	Medium	1 / 25 (4%)	2.9	2.6	2.2	7.7
Department of Natural Resources	Large	62 / 25 (260%)	2.8	2.7	2.2	7.7
Department of Children, Youth and Families	Large	27 / 50 (54%)	2.8	2.5	2.4	7.7
Department of Transportation	Large	59 / 50 (118%)	2.8	2.9	2	7.7



# Initial Agency Readiness Scores

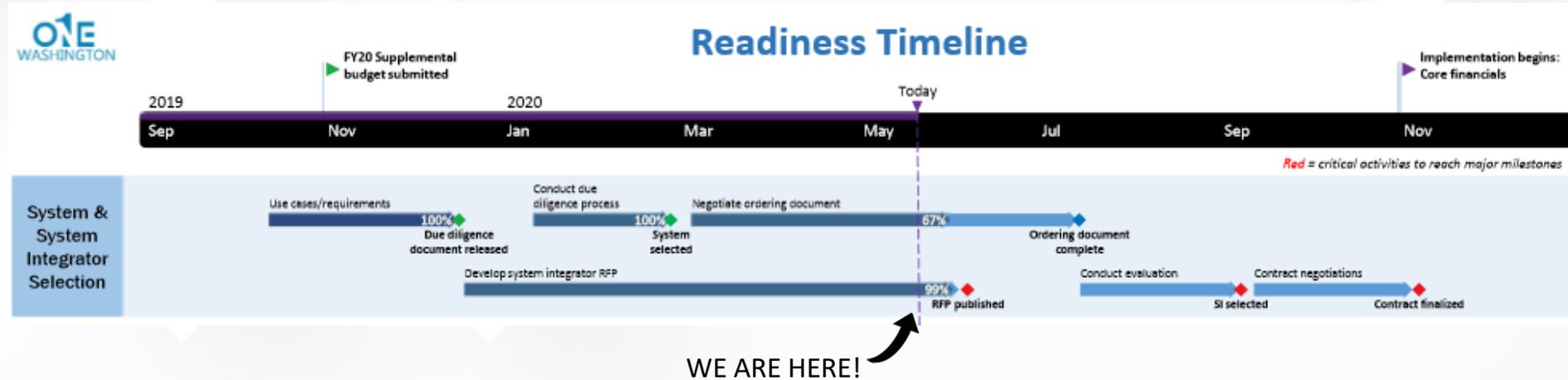
*This table is a continuation of the table on the previous slide.*

AGENCY	AGENCY SIZE	RESPONSE RATE	READINESS SCORES			
			PEOPLE (1-4)	PROCESS (1-4)	TECHNOLOGY (1-3)	TOTAL (1-11)
Department of Commerce	Medium	1 / 5 (20%)	2.3	3.1	2.2	7.6
Legislative Technology Services	Small	1 / 5 (20%)	3.0	2.6	2.0	7.6
Administrative Office of the Courts (on behalf of agencies of the Court)	Medium	1 / 5 (20%)	3.2	3.4	N/A	6.6
Department of Ecology	Large	61 / 25 (244%)	3	3.1	N/A	6.1
Department of Social and Health Services	Large	54 / 50 (108%)	2.9	2.9	N/A	5.8
Parks and Recreation Commission, Washington State	Medium	22 / 25 (88%)	3	2.8	N/A	5.8
Department of Licensing	Large	20 / 25 (80%)	2.9	2.8	N/A	5.7
Department of Agriculture	Medium	19 / 25 (76%)	2.8	2.8	N/A	5.6
Military Department	Medium	9 / 5 (180%)	2.6	2.5	N/A	5.1
Office of the Superintendent of Public Instruction	Medium	10 / 5 (200%)	2.2	2.4	N/A	4.6



- = low score for that category (or response rate)
- = average score for that category (or response rate)
- = high score for that category (or response rate)

# Near Term Milestones



## UPCOMING EVENTS

June/July

1. **Spring 2020** – Communicate system selection to the enterprise
2. **Spring 2020** – Release system integrator RFP
3. **Summer 2020** – Conclude system contract negotiations
4. **Summer 2020** – Agency readiness meetings
5. **Summer 2020** – Select system integrator
6. **Fall 2020** – Conclude system integrator contract negotiations

# WRAP UP AND QUESTIONS



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## **FOR MORE INFORMATION:**

Website: [one.wa.gov](http://one.wa.gov)

Email: [onewa@ofm.wa.gov](mailto:onewa@ofm.wa.gov)



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## **TO PROVIDE FEEDBACK:**

[onewa@ofm.wa.gov](mailto:onewa@ofm.wa.gov)



# Project Briefing - Tolling Back Office System Replacement

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# Agenda

1. Purpose
2. Project overview, history and implementation status
3. Issue statement
4. WSDOT Management strategy and resolution action plan
5. Quality Assurance Update
6. Independent Verification and Validation Update
7. Questions and Discussion

55%

# Purpose

- The external Back Office System (BOS) is a core element of WSDOT's Toll program. The BOS manages the customer relationship and financial management aspects of WSDOT's Tolling program and its *Good To Go!* Toll payment program.
- The existing Contract was a bundled procurement for customer service center operations and a back office system and this Contract is approaching end of Contract term. The new BOS and Operations will be separated into two contracts and have been procured separately.
- The new BOS System will provide the full functionality of the existing system, address functional deficiencies, address key limitations with the existing system, and support several key enhancements to program functionality.

# Project overview

- Procurement complete in June of 2017 (Award to ETAN), base 6 year term with 6 option years.
- Two phases of Implementation:
  - Phase 1 - consists of all current and new core functionality modernized and enhanced.
  - Phase 2 - consists of all select automation upgrades and elected option modules such as trip building, collections functionality, and data warehouse.

# Implementation Status

- Original Go-Live contract date: December 1, 2018.
- The project has encountered repeated delays over the past 18 months. ETAN has struggled with maintaining appropriate resources, accurate estimation of schedule activity durations, and overall schedule adherence.
- **Due to these repeated delays and now Covid-19 related delays, July 2020 is the earliest achievable Go-Live date for ETAN. WSDOT is evaluating whether an August Go-Live date would allow for better contingency planning and decrease risk. Further success in the Operations test will better inform this analysis.**
- Significant progress continues to be made:
  - Substantial completion on all core FastLane
  - Factory Acceptance Test Execution & Integration and Commissioning testing and User Acceptance Testing is Complete
  - Data Migration and Transition Planning is substantially complete with refinements continuing
  - Infrastructure build-out and provisioning of CSC and WICs complete
  - Train-the-Trainer Training is now complete
  - 5 week Operations Test has begun on May 28<sup>th</sup>

# Implementation Status (Cont.)

- Remaining BOS Critical Path Activities:
  - 5 Week Operations Test began on May 28<sup>th</sup>.
    - This is a WSDOT driven test within the production environment comprised of the most common workflows and Ad-hoc testing.
    - The testing team includes WSDOT and AECOM technical and operations subject matter experts.
  - 2 Week Defect Remediation Period (As currently planned, however this is an area for risk mitigation).
  - 1 Week Transition
    - ETCC Shutdown
    - ETAN Migration
    - ETAN Start up
  - Go-Live (Analysis on final date underway)
- Remaining Operations Activities:
  - Staff Ramp Up
  - Troop Training (Local, Remote and legacy CSR's)

# Issue Discussion, Management Strategy and Resolution Action Plan

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# Issue Statement

ETAN has struggled with maintaining appropriate resources, accurate estimation of schedule activity durations, and overall schedule adherence

- Even with increased resources ETAN remains limited in its ability to increase project velocity
- ETAN continues to struggle with accurately predicting critical activity durations
- The continued project delays increase WSDOT's costs to maintain business continuity and impact other dependent projects.

# Management Strategy and Issue Resolution Plan

- **Increased Executive-level Oversight**
  - Increased frequency of coordination to more quickly address schedule and resourcing issues.
  - In-person Executive check-ins have continued on a weekly basis
- **Increased Transparency through WSDOT Schedule Maintenance**
  - WSDOT continues ownership of Schedule Maintenance activities
  - ETAN leads provide status directly to WSDOT
  - WSDOT has access to internal development and defect tracking tools used by ETAN
  - WSDOT ownership of Go-Live readiness assessments and needed coordination.
  - WSDOT has continued to streamline review and approval processes to gain schedule efficiency.
- **Increased Resourcing**
  - ETAN continues to utilize increased resources from a 3<sup>rd</sup> Party Technical services firm to support additional testing and development.
  - WSDOT has increased access to WSDOT and consultant SME's to supplement ETAN's resources.
  - WSDOT has shortened turn-around times for critical deliverable reviews where possible.

# Management Strategy and Issue Resolution Plan

- Maintain National Industry Perspective

- WSDOT continues to consult regularly with our Expert Review Panel, made up of national agency leaders and industry experts.

- WSDOT has completed a review of ETAN's project schedule, risks, and path to Go-Live by ERP members. Feedback has been provided to WSDOT, summarized as follows:

*“The ERP members agree that WSDOT and ETAN specifically, made good progress. The results of testing, the elimination of all high and critical software defects, and a sound approach to confirm readiness for Go Live are encouraging. The leadership of WSDOT staff and the steady improvement in performance by ETAN bode well for a successful Go Live. However, Operations testing may uncover additional system errors. ETAN will need time, likely more than eleven days to fix and retest. Even with that, there will be issues upon transitioning to the new system. No back-office projects open without problems. Hopefully, those issues are few, minor, and quickly addressed.”*

# Management Strategy and Issue Resolution Plan

- Maintain Quality Assurance and Independent Validation & Verification
  - QA oversees independent risk assessment on management level
    - More frequent check-in with QA will ensure more timely awareness and escalation of risks.
  - IVV oversees independent risk assessment on technical level
- Negotiated additional contractual liquidated damages to further encourage schedule adherence
  - WSDOT and ETAN agreed on damages to compensate WSDOT for the costs of delay as well as new daily damages if additional delays are realized.

# External Quality Assurance Update

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# QA - Tolling BOS Replacement Project Status

**Project status:**

**HIGH**

PCG is tracking significant findings in the areas of Schedule Management, Cost Management and Quality Management.

Finding	Total	Low	Med	High
Issues	1	NA	NA	1
Risks	10	2	2	6
Concerns	0	NA	NA	NA

Since the last presentation to the TSB, PCG QA has provided an updated monthly QA report and risk log, which includes revised risk descriptions and recommendations.

## Top Five (5) QA Risks

Date Established	Description	Status
5/15/2020	As a result of ETAN's lack of adherence to schedule management, schedule delays may occur, resulting in the potential to affect the critical path and the ability to maintain the project go-live date.	High
5/15/2020	ETAN has been focused on meeting the go-live date rather than readiness and quality management, which may result in decreased quality of final product.	High
5/15/2020	As a result of insufficient ETAN staffing levels, it is unclear if ETAN can continue to maintain required velocity to achieve the project go-live date.	High
3/15/2019	With the repeated delay in the go-live date, stakeholders may develop lack of confidence in the successful, on time delivery.	High
5/15/2020	As a result of required safety measures due to COVID-19 there are potential challenges to working remotely, reduced capacity for training, operations testing and go-live resulting in a loss of collaboration.	High

\*This information is a point in time accurate on 6/2/2020. The nature of the risks/issues listed here are highly dependent upon progress which may be achieved in the days prior to the presentation, resulting in potential resolution of the risks/issues.

# Independent Verification and Validation Update

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06/09/2020

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# IV&V - Tolling BOS Replacement Project Status

**Project status:**

**HIGH**

PCG is tracking significant findings in the areas of Design and Development, Implementation, Testing and Implementation, and Project Management.

Finding	Total	Low	Med	High
Issues	5	0	2	3
Risks	6	3	2	1
Concern	1	NA	NA	NA

Since the last presentation to the TSB, PCG IV&V has closed 2 risks and 1 issue.

## Top IV&V findings

Date Established	Description	Status
1/15/2020	ETAN's staffing construct (technical assets) has resulted in schedule slippage due to conflicting priorities in assignment of personnel, and concurrent activity conflicts.	High
1/15/2020	Finalization of SDDD incomplete (document in review and comment resolution) and RTM updates for non-testable requirements remain incomplete.	High
5/15/2020	Modification of the code base during testing may result in the unintended introduction of new defects in previously tested functionality.	High
2/15/2020	Go-Live date is scheduled weeks from end of Operational Test – this may not allow sufficient time for resolution of defects discovered in Ops Test.	Medium
3/15/2020	The development punch list items with a scheduled complete date are not complete, creating potential downstream impacts. *The initial dev is complete, awaiting QA to formally complete. High and Critical Defects resolved on these items	High

\*This information is a point in time accurate on 6/2/2020. The nature of the risks/issues listed here are highly dependent upon progress which may be achieved in the days prior to the presentation, resulting in potential resolution of the risks/issues.

# Tolling Back Office System Replacement

- Questions?

# Project Briefing - ctcLink

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06/09/2020

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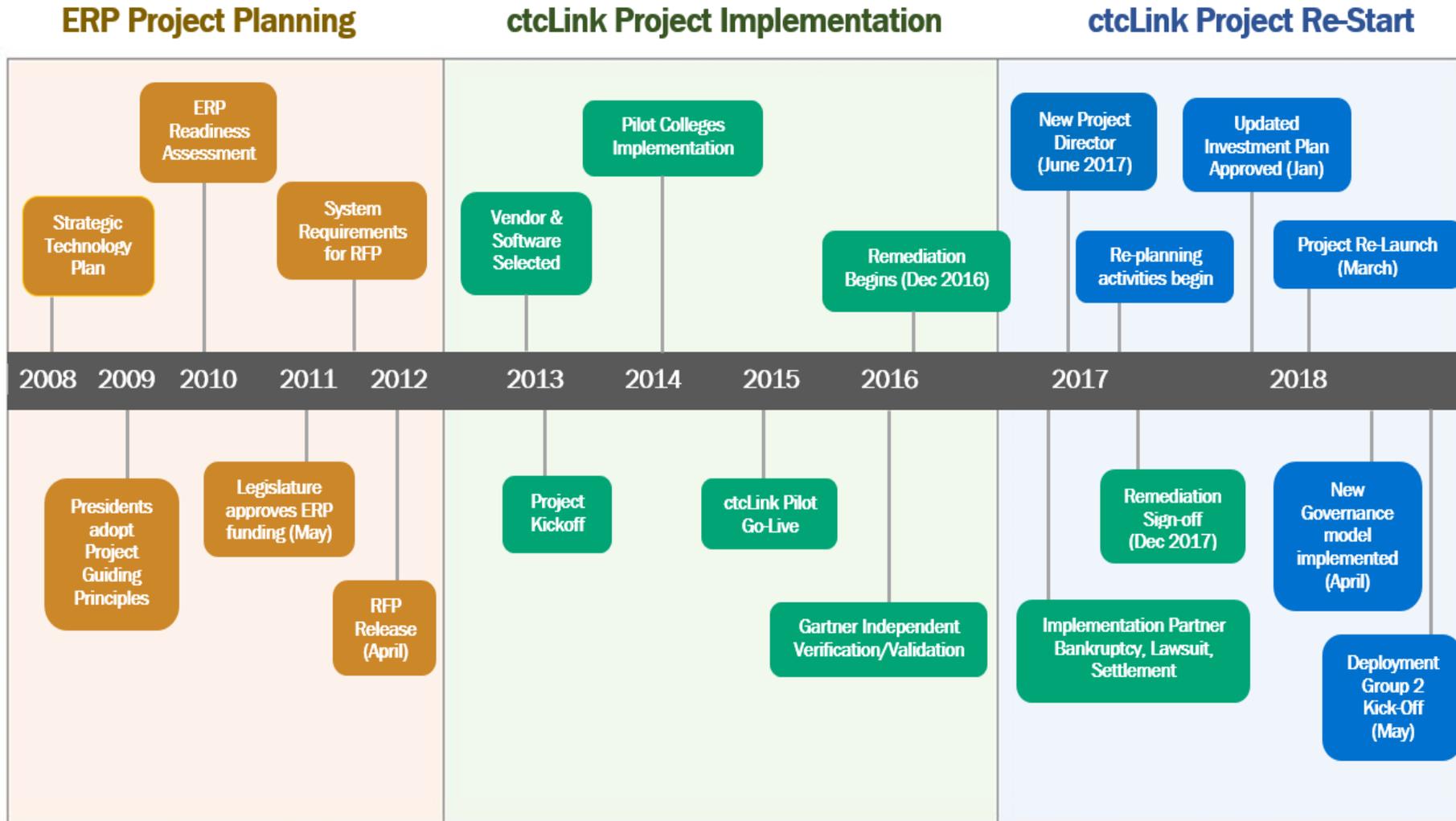
# ctcLINK PROJECT REPORT

## Technology Services Board Quarterly Meeting

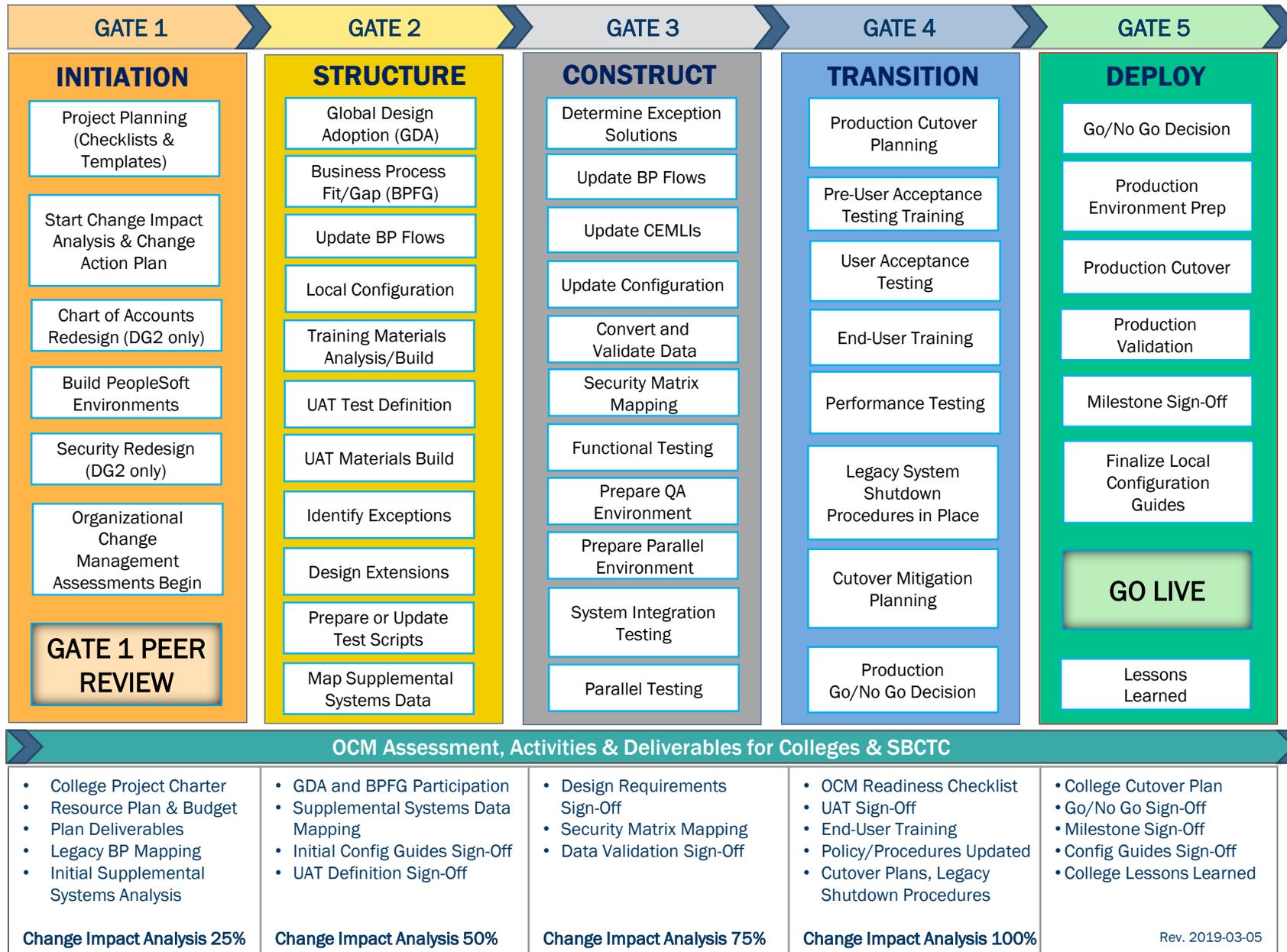
June 09, 2020

- **Jan Yoshiwara** – SBCTC Executive Director and ctcLink Executive Sponsor
- **Grant Rodeheaver** – SBCTC Deputy Executive Director of Information Technology (CIO)
- **Christy Campbell** – SBCTC ctcLink Project Director
- **Paul Giebel**– Moran Technology Consulting / External QA Vendor

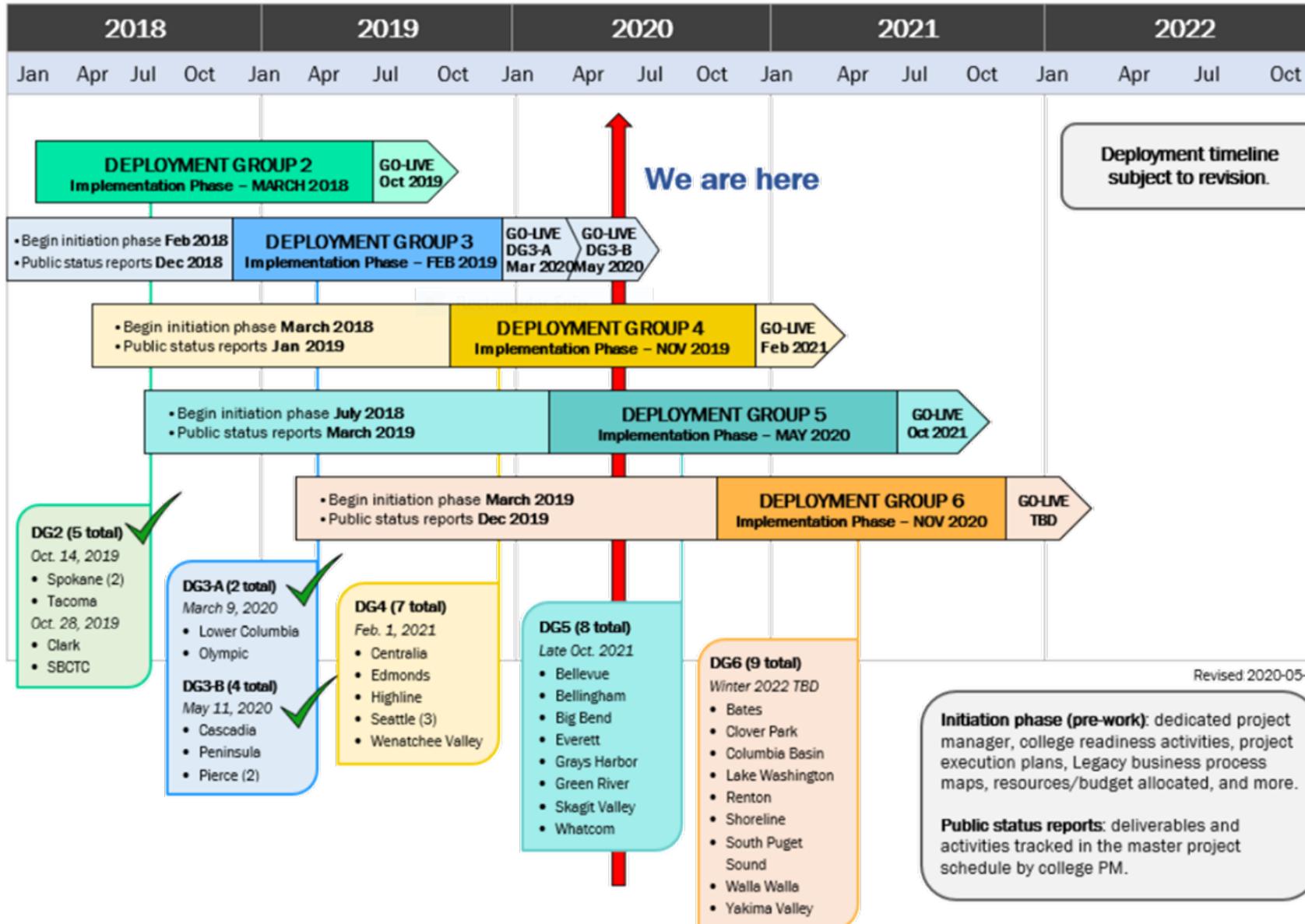
# CTCLINK PROJECT HISTORY



# CTCLINK QUALITY GATES & MILESTONES



# ctcLink DEPLOYMENT GROUPS AND TIMELINE



## ctcLink Remediation & Solutions Status – May 2020

Solution	Status	Completion Date
<b>Campus Solutions</b>	7 of 45 remain open	March 2020
<b>Financial Management</b>	5 of 39 remain open	March 2020
<b>Human Capital Management</b>	3 of 25 remain open	March 2020
<b>Faculty Workload</b>	Complete	March 2019
<b>DRS Redistribution</b>	Complete	May 2019
<b>Absence Management</b>	Complete	April 2019
<b>Security Audit Controls</b>	Complete	October 2019
<b>Student Billing/Third-Party Billing</b>	Complete	May 2019
<b>Budget Planning Tool</b>	SOW Complete	Implementation ongoing
<b>Online Admissions App</b>	SOW in progress / BAC and WACTC approved ongoing college maintenance costs.	Contracts Complete – April 2020
<b>Continuing Education</b>	Master Contract in Final Review	Contracts Complete - April 2020

Solution	Status	Contract Complete	Implementation Planned Date
<b>Continuing Education</b>	<ul style="list-style-type: none"> <li>• <b>Master Contract approved and signed</b></li> <li>• <b>Current work on subsequent SOWs for implementation integration is pending procurement and signature</b></li> </ul>	April 2020	Colleges currently working with vendor to implement solution  Integration Implementation – DG4, DG5, and DG6
<b>Online Admissions Application</b>	<ul style="list-style-type: none"> <li>• <b>Begin working with vendor on implementation plan and roles and responsibilities of SBCTC staff</b></li> <li>• <b>Working with vendor on timeline and baseline project plan</b></li> </ul>	April 2020	Implementation and integration – DG4
<b>Budget Planning Tool</b>	<ul style="list-style-type: none"> <li>• <b>Working with DG2/DG3 Colleges on summer availability for the initial implementation and deployment</b></li> <li>• <b>Working with vendor on timeline and baseline project plan</b></li> </ul>	March 2020	DG2/DG3 – Winter 2021 DG4 – Winter 2022 DG5/DG6 - TBD

## Program Overall Status – May 11 - 22, 2020

<b>Overall</b>	<b>Y</b>	<ul style="list-style-type: none"> <li>• Program is on track, per timeline, scope and budget</li> <li>• Repeatable DG conversion approach being finalized and validated with DG4</li> <li>• COVID-19 Impacts being evaluated and mitigated</li> </ul>	<b>Scope</b>	<b>Y</b>	<ul style="list-style-type: none"> <li>• Requirements Traceability Matrix (RTM) needs to be updated to validate original RFP requirements have been implemented, tested, and end-users trained on the processes and functionality</li> </ul>
<b>Schedule</b>	<b>Y</b>	<ul style="list-style-type: none"> <li>• Monitoring scope and impact of schedule of: Budgeting Tool, Continuing Education, Online Admissions Application solutions</li> </ul>	<b>Budget</b>	<b>G</b>	<ul style="list-style-type: none"> <li>• Currently tracking under budget</li> <li>• Submitted for Gate 5 funding allotment</li> </ul>

### Executive Summary

The project is tracking per schedule, under budget. Scope review and definition continues due to rework of key solutions. Due to the COVID-19 outbreak and the "stay home" order, SBCTC and college teams continue working remotely.

Each Deployment Group (DG) is engaged in ctcLink activities:

- DG3-A went live on March 9, 2020 and is now getting support from the SBCTC ctcLink Customer Support organization.
- DG3-B went live on May 11, 2020 and is getting Tier 2 post go-live support from the Customer Support organization through daily open WebEx sessions.
- DG4 Business Process Fit Gap (BPFG) sessions schedule was previously paused to accommodate the split go-live schedule for DG3. Due to COVID-19, the remaining BPFG sessions are being delivered remotely.
- DG5 will kick off its implementation phase on May 26, 2020 with an approved late October 2021 go-live (specific date TBD).
- DG6 is in its Initiation Phase and will hold its Peer Review for Gate 1/Initiation Phase in July.

Replacement Solutions:

- Continuing Education – CampusCE was chosen as the new CE solution. The Master Contract has been signed and SOWs in progress. Colleges have a choice to use/continue to use CampusCE based on the original RFP pricing, or opt out of using the product. As previously planned, the project pays for initial CampusCE implementation and integration to ctcLink. Several colleges have already been working with CampusCE to implement per the master contract.
- Online Admissions Application – The implementation contract has been approved and signed for the new OAA solution, developed by Kastech. SBCTC has begun internal planning meetings to discuss the implementation approach and timing with Deployment Groups.
- The Budget Planning Tool has been approved and contract signed. Pre-planning for implementation will be integrated into the program schedule. Colleges will implement in groups, beginning with DGs 2 and 3. (Change Order will include DG3 colleges). Work to begin this summer.

### Overall Status Summary per Deployment Group

DG#	PMO-Reported Status	Comments	College/Agency	Self-Reported Status
DG2	Deployed	• Transitioned to ctcLink Support	Clark, SBCTC, Spokane	
DG3-A	Deployed	• Transitioned to ctcLink Support	Lower Columbia, Olympic	
DG3-B	Deployed	• Went live May 11, 2020 • In post Go-Live support phase	Cascadia, Peninsula, Pierce	
DG4	Y	• BPFGs in progress • College Homework • Begin Local Configuration • Begin preparing for Data Conversion/Data Validation	Centralia	Y
			Edmonds	Y
			Highline	Y
			Seattle	Y
			Wenatchee	Y
DG5	G	• Working and reporting on Initiation Phase activities	Implementation reporting begins June 2020	
DG6	G	• Working and reporting on Initiation Phase activities	Implementation reporting begin Nov 2020	

# DEPLOYMENT GROUPS (DG) 2 & 3 STATUS

DG	GO-LIVE	ACTIVITY	COLLEGES/AGENCY	STATUS
2-A	10/14/2019	PeopleSoft 9.2 Upgrade	Spokane, Spokane Falls and Tacoma community colleges	<ul style="list-style-type: none"> <li>Transitioned to ctLink Customer Support</li> </ul>
2-B	10/28/2020	Go-Live	Clark College, SBCTC Agency	<ul style="list-style-type: none"> <li>Transitioned to ctLink Customer Support</li> </ul>
3-A	03/09/2020	Go-Live	Lower Columbia, Olympic	<ul style="list-style-type: none"> <li>Transitioned to ctLink Customer Support</li> </ul>
3-B	05/11/2020	Go-Live	Cascadia, Peninsula, Pierce	<ul style="list-style-type: none"> <li>Transitioned to ctLink Customer Support</li> <li>Some close-out activities underway</li> </ul>

Ranking	Risk Description	Risk Owner	Key Risk Management Activities / Mitigation
	DG4: Data Size & Conversion Approach	Tara Keen, Eli Hayes, Chandan Goel	The ctcLink Project Technical Team is working with Managed Services to evaluate DG4 conversion data size and evaluate the best conversion approach
	Production Calendar & PeopleTools Update 8.57 Work Effort	Tara Keen	SBCTC IT App Services and the ctcLink project team are working closely to align production calendar dates and timing to make sure there is the least amount of impact to the timeline and project activities for DG4 and DG5.
	Two Risks: COVID-19 Health Concern and Impacts: 1) DG4 Full Remote Impact 2) DG5 Start Impact based on DG3-B 3) Project Team Impact	Christy Campbell, DG4 & DG5 PMs	The coronavirus (COVID-19) outbreak is a fluid situation which we are monitoring closely. DG4 continues to have BPFPG sessions remotely. DG5 will be kicking off on May 26 and a decision has been made to deliver BPFPG sessions remotely.

Ranking	Risk Description	Risk Owner	Key Risk Management Activities / Mitigation
	DG4: Lack of a Baseline Schedule & Project Schedule Inadequate for College Planning  (Two Issues Combined)	Eli Hayes	An updated project plan was provided through summer and fall with specific requests to spread out the Production Workshop schedule. The ctcLink project team will continue to work closely with the DG4 PMs to provide better explanation and clarity on upcoming activities so they can align their college planning/ local activities.
	DG4: Outdated Video Training Courses	Dani Bundy	Many of the training videos embedded in the PeopleSoft training courses were created in 2018 with the 9.0 interface. Training team has better clarity on which courses the PMs had concerns about and will be discussing timing for updating the videos after DG3-B post go-live support ends May 29.
	DG4: Inconsistent methods used by SBCTC for obtaining college configuration values	ctcLink Pillar PMs	We have discussed this with DG4 PMs and understand their concern. We will be recommending/suggesting that DG4 PMs create a local / shared drive to track the latest files and documents for BPFM homework and important data-related documents. We will also discuss how colleges can access Gold Configuration info post go-live at our next DG4 meeting

**ctcLink Quality Assurance Scorecard**  
**Moran Technology Consulting | May 2020**

**Overall:**

**Y**

RISK STATUS	PROJECT AREA	DESCRIPTION/NOTES
G	SBCTC/Governance	Governance framework continues to work as expected.
G	Program Management	The PMO continues to address plans and actions to deal with the immediate issues caused by the Covid-19 virus.
Y	Phase Scope	Replacement solutions are being planned and scheduled for future ctcLink project delivery.
Y	Schedule Status	The splitting of DG3 into 2 go-lives has compressed the schedule for DG4.
G	Testing	Testing capabilities for deployment groups has seen significant improvements.
G	Training	More training of front-line administrative staff, a QA concern, was possible during the DG3 implementations. Training team continues closely monitoring online training attendance and outcomes.
G	Configurations/Data Conversion	Development of a conversion plan for DG4 to meet the needs of multiple, larger colleges is in progress.
G	Organizational Change Management (OCM)	The ctcLink PMO has incorporated many elements to support the colleges with being prepared for implementing the changes coming with PeopleSoft.
G	Project Staffing	Project staffing continues to make adjustments as necessary.
Y	Technical Environment	Increased workload of additional colleges impacts both the support staff and managed services.

LEGEND	GREEN	YELLOW	RED
Risk Description	Low risks may be encountered. NO immediate action needed	Moderate risks may be encountered. Serious deficiency and action item recommended.	High risks may be encountered. Needs to be escalated and can impact project effort or cost.

# Washington State Office of the Chief Information Officer (OCIO) Oversight as of May 2020

**Overall Status**

**Y**

OCIO Conditions to new ctLink Investment Plan Approval			Status	ctcLink Technology Pool Status and Gate #			Status
<b>G</b>	1	Project must remain in line with SBCTC and OCIO policies	Ongoing	<b>G</b>	--	Pre-IT Pool Implementation, Stability & Remediation	Approved
<b>G</b>	2	QA (Moran) to report to ctLink executive sponsor and State CIO	Complete	<b>G</b>	1	Planning & Remediation	Approved 1/1/2018
<b>G</b>	3	Follow pre-determined OFM funding gates and approvals	Complete	<b>G</b>	2	DG2 – Initiation & Structure Phase	Approved 1/1/2018
<b>G</b>	4	Monthly status reporting	Complete	<b>G</b>	3	DG2 – Construct Phase DG3 – Initiation & Structure Phase	Approved 1/1/2019
<b>G</b>	5	Continue reporting on Remediation items in Integrated Work Plan	Complete	<b>G</b>	4	DG2 – Transition & Deploy Phase DG3 – Construct Phase DG4 – Initiation & Structure Phase	Approved 7/1/2019
<b>Y</b>	6	OCIO approval of the 3 remediation solutions: Budgeting tool, Continuing Education Application, Online Admissions Application	In Progress	<b>G</b>	5	DG3 – Transition & Deploy Phase DG4 – Construct Phase DG5 – Initiation & Structure Phase	Budget & Deliverables Submitted Pending Approval by OCIO
<b>G</b>	7	OCIO must be notified prior to use of contingency funds	N/A	<b>G</b>	6	DG4 – Transition & Deploy Phase DG5 – Construct Phase DG6 – Initiation & Structure Phase	Future 11/1/2020
<b>G</b>	8	Perform a post-implementation review (lessons learned) after each deployment and post on the OCIO dashboard within 30 days of go-live	Ongoing for future DGs	<b>G</b>	7	DG5 – Transition & Deploy Phase DG6 – Construct, Transition & Deploy Phase	Future 11/1/2021
<b>G</b>	9	Process and timeline for filling the SBCTC CIO position by 1/31/2018	Complete				

*Note: New ctLink Investment Plan approved by OCIO, with above conditions, on Jan. 19, 2018.*

# KEY LESSONS LEARNED TO DATE

- Executive leadership engagement at colleges and SBCTC is critical to the ctcLink program and college implementation success.
- Holistic, iterative process to move colleges ahead is vital: pre-planning activities lead to fundamentals, which leads to global configuration which leads to local configuration and new business processes; culminating in data validation, testing and user acceptance.
- Methodology and model of “mutual partnership with colleges” is necessary for learning and adoption.
- “Change management” vs. “technical implementation” is essential. ctcLink is a *People Project*.
- Repeatable data conversion process requires complex levels of collaboration across more stakeholders and calendars than expected (project, support, agency, outside vendors).
- Level of complexity to manage user access levels (security mapping) is far greater than in the Legacy system.
- Training model has had to continuously evolve since initial pilot go-live .
- Post Go-Live Support now includes a transitional phase before hand-off from the ctcLink Project team to ctcLink Customer Support Organization.



**COMMUNITY AND  
TECHNICAL COLLEGES**  
*Washington State Board*



# QUESTIONS?



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# Public Comment

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06/09/2020

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