



Business improvement initiative update

June 2009



Associate State
Forester Clark Seely

Improving the way we do business

Since the last newsletter, the agency has been actively moving forward with several of the business improvement initiative projects, including State Forest Revenue Tracking, Forest Activity Tracking, Cost Allocation, and Internet/Intranet Modernization.

During this difficult financial time, you might be asking “Why are we investing in projects while having to scale back operations?” A great question. Although it seems counter-intuitive, the current budget situation makes it all the more important to improve our information technology capabilities and our business processes.

Faced with doing more with less, investing in reliable, flexible and robust information systems and business processes will provide the agency the adaptability it needs both to endure these challenging times and flourish in the future. With legislative support for updating our systems and for changing our business processes to deliver services more creatively and more efficiently, we have a unique opportunity to achieve a variety of business and strategic goals over the next several years.

My vision for the future is one in which we maximize our use of technological tools in shaping how we interact, share and report on our business. I challenge each of you to take one element of your work and think about how it can be done better. In making both small changes to our process, and implementing larger business and system improvements, we will be able to become a much stronger, and more innovative, agency.

In leading that effort, look forward to a new format for the newsletter next month. We are going to change it up a little, with a focus on providing an in-depth look into one of the FBII projects or IT activities with each issue, and deliver them on a more frequent basis. If you have ideas about topics that you would like to read about, please forward those ideas back to Barbara Benda, whose contact information is included in the newsletter.

In the meantime, read on to learn about initiatives that are currently underway.

Thanks for your involvement,

Clark

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Web Intranet Modernization

To be completed Dec. 1, 2009 - see p. 2

Electronic Records Management

Complete strategy development by mid-April 2010 - see p. 3

Topic of the month: Agile

If you have been on the Salem campus recently, you’ve probably heard the word “agile” in at least one of your conversations. The current favorite buzzword of the Information Technology Program (IT), “agile” refers to a set of methodologies for planning and delivering software projects.

ODF was introduced to the agile method through the Board of Forestry Decision Support System project, which was led by

outside contractors. Through that project, staff was able to engage the business in delivering a successful product in a relatively short timeframe. Since then, members of the IT Program and various business staff have received training in the agile methodology, which is described in more detail below.

Agile evolved in the mid-1990s in response to very structured development methods. The methods divide project tasks into

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Forestry Business Improvement Initiative: Projects underway

FACTS Stopgap

Purpose: Convert the existing Forest Activity Computerized Tracking System (FACTS) database to an updated environment that is more readily supportable by IT, in anticipation of the retirement of application developer Chuck Aylworth.

Start: June 1, 2009

Complete: Implement by end of year and optimize through early 2010.

Project manager: Michael Schuft

Business analyst: Joe Touchstone

Status: Schuft and Touchstone have been working with Aylworth and database analyst Andy Brock to determine the system specifications. Aylworth's retirement will leave the IT Program without an experienced Paradox application developer who can support and maintain existing FACTS applications, so it is essential that it be replaced in a more modern, supportable development environment. This stopgap product is not intended as a substitute for the larger Forest/Fire Operations and Activities Tracking System Project.

Next steps: IT is planning the project, and Touchstone will meet with field staff and Private Forest's management staff in July to gather information to assist with the transition from the existing FACTS.

State Forest Revenue System

Purpose: Develop a new timber sale and revenue tracking system that will more effectively manage forest products sale information and the subsequent distribution of revenue.

Start: Dec. 22, 2008

Complete: TBD. The recent cutbacks to the State Forest budget have necessitated slowing the pace of the project. Hiring of a dedicated Project Manager will not occur until the analysis phase is finished.

Project manager: None.

Business analyst: Terri Johnson

Status: Johnson has nearly finished documenting the business process flows

and has reviewed them with ODF staff and field personnel. She has also been gathering system requirements information.

Next steps: Concurrent with the Department of Administrative Services (DAS) completing its review of the business case for the project, ODF will conduct an environmental scan to learn if an existing product is available that will meet agency requirements. With that information in hand, ODF will either procure the product or select a contractor to develop one.

Web Modernization: Intranet

Purpose: Develop a new Intranet system to replace the existing ODF Intranet. The new Intranet will run on Microsoft Sharepoint, a server platform that features browser-based collaboration and a document management platform. The system will consolidate all ODF internal information in a single location.

Start: May 4, 2009

Complete: Dec. 1, 2009

Project manager: Dale Johnson

Business analyst: Provided by vendor

Status: A draft Internet/Intranet strategy has been completed and released for review. A request for proposal was posted, and a vendor, Marquam Group, was selected and a contract developed. Work is slated to begin in early July, pending a Department of Justice contract review.

Next steps: Johnson is working with the ODF executive team to plan the project, with project kickoff to occur in early July. Several project teams will be formed. These will include a core team of content owners that will be actively involved in the project, and a steering committee that will provide change- and issue management and also guide business decisions. Actual migration of the Intranet content to a new Intranet site will take place later in the summer.

Business Services Cost Allocation Tool

Purpose: Develop a methodology for allocating indirect agency costs to multiple

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Forestry Business Improvement Initiative: Projects underway *(cont.)*

Business Services Tool *(cont. from p. 2)*

charge codes, and create a tool that will electronically break out the data to the appropriate charge codes and export it into the Statewide Financial Management Application (SFMA) maintained by DAS. At this time, the scope of the project has been limited to developing tools to address the data sets for expenditures and payroll.

Start: Oct. 1, 2008

Complete: July 31, 2009 (additional system enhancements to follow later in the summer.)

Project manager: Barbara Benda

Business analyst: Vickie Lesser

Business leads: Diane Smithburg, Expenditures; Betsy Kelly, Payroll.

Status: The business processes have been analyzed and the system requirements documented. IT has begun developing the applications, and has procured and is implementing technical tools that will

allow data to be electronically imported and exported among the appropriate state systems. The addition of this value-added functionality will eliminate the need for duplicate entry of data into two systems (CAT and OSPA). However, this has resulted in a longer development timeframe. To make the system operational for the new biennium, the time available for testing and training has been reduced.

Next steps: Test plans are under development, and user testing of the expenditure piece will begin in June. Implementation has been targeted for July 1, and Smithburg will schedule training. Development of the payroll tool will be completed June 26, with testing and development of the training materials to take place the week following. Kelly will schedule training for the week of July 6. Target implementation date for the payroll tool is July 15.

Forestry Business Improvement Initiative: Projects completed

Board Decision Support System: Phase 2

Purpose: Develop a Web-based tool to improve productivity, communication and decision-making for the Board of Forestry and ODF employees that provide information to the board.

Start: Oct. 1, 2008

Complete: March 18, 2009

Project manager: Dale Johnson

Business analyst: Provided by vendor

Status: Phase 2 completed; Phase 3 is pending.

Forestry Business Improvement Initiative: Projects planned

Web Modernization: Internet

Purpose: Move all of ODF's dynamic Internet content to Oregon.gov, which is supported by DAS and runs on the Teamsite platform. ("Dynamic content" is information on a Web site or Web page that changes often, usually daily and/or each time a user reloads or returns to the page.) ODF previously moved most of its static Internet content to Oregon.gov, but at the time Teamsite was incapable of supporting dynamic content. An upgrade in October 2008 expanded Teamsite's capability, and ODF is now able to move all remaining Internet data from the ODF server onto Oregon.gov.

Start: Oct. 1, 2009 (tentative)

Complete: March 1, 2010

Project manager: Dale Johnson

Business analyst: TBD

Status: The start date is contingent on:

1. Availability of DAS E-Government office staff to assist.
2. Identification of data that should be made available on the Internet, which is another task of this overall project.

Electronic Records Management

Purpose: Create a common set of tools, standards and policies to enable ODF to manage its documents and records from creation to final disposition in a consistent, logical manner.

Start: Dependent on DAS's release of the

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Forestry Business Improvement Initiative: Projects planned *(cont.)*

Electronic Records Mgmt. *(cont. from p. 3)*

Electronic Records Management System (ERMS) price agreement.

Complete: TBD

Project manager: TBD

Business analyst: TBD

Status: Strategy document is in final draft; currently waiting for DAS to complete ERMS price agreement.

Next steps: Complete strategy development by mid-April 2010; DAS release of ERMS price agreement list; interview ERMS vendor and select; install software; run ERMS integration; conduct user testing; put into production.

Purpose: The full scope of the project is yet to be determined, but initial thoughts are to have this system provide decision-support tools such as accomplishments tracking, progress on fulfillment of key

performance measures, and display of project information and timelines.

Start: Jan. 1, 2010

Complete: TBD

Project manager: Dale Johnson

Business analyst: Provided by vendor

Status: Scheduled to start in January 2010.

Board Decision Support System: Phase 3

Purpose: The full scope of the project has yet to be determined, but initial thoughts are for this system to provide decision-support tools such as tracking of accomplishments, progress on fulfillment of key performance measures, and display of project information and timelines.

Start: Jan. 1, 2010

Complete: TBD

Project manager: Dale Johnson

Business analyst: Provided by vendor.

Status: Scheduled to begin in January 2010.

Agile *(cont. from p. 1)*

distinct phases in which work is planned, scheduled and agreed-upon at the beginning of a project, and then completed sequentially. In this approach, each phase must be completed before the next can begin, much like an assembly line. By adhering to a rigid (and often outdated) plan, projects can become inflexible, slow and prone to failure. Reacting to changing needs is often quite difficult and expensive, which can lead to a final product that needs to be reworked shortly after completion. In comparison, agile takes a lighter, faster, more flexible approach. The agile method breaks tasks into small iterations, enabling the development team to produce small, functional elements of the end product every few weeks. Planning cycles occur with every iteration, or every two to four weeks. As a result, customers have recurring opportunities to meet with the development team, and inspect and plan the emerging product. Remaining work can be prioritized at the start of each cycle, and the team can adapt or make changes along the way. The focus thus becomes

meeting customer needs and delivering high business value. In summary, agile methods promote a:

- project management process that encourages frequent inspection and adaptation
- leadership philosophy that encourages teamwork, self-organization and accountability
- set of engineering best practices that allows for rapid delivery of high-quality software
- business approach that aligns development with customer needs and agency goals

As ODF moves forward with the Forestry Business Improvement Initiatives, the IT Program is excited to be able to implement this new methodology and to provide more streamlined services to the business.

Currently IT is developing a strategy for converting over to an agile environment, and is looking for the right project to start the effort. If you have ideas on a project that would be appropriate for the agile environment, please contact Michael Schuft, GIS/Application Development Manager, at 503-945-7331.

Provide comments and feedback to:

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