WaTech

Washington Technology Solutions

WaTech Best Practices Summary

October 2023

Office of the Chief Information Officer

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Executive summary

The report showcases:

- The Office of the Chief Information Officer's (OCIO's) efforts in disseminating project management best practices through white papers and events. It highlights topics like Agile, bullet point usage and QA readiness.
- Insights from the Project Management Community of Practice (CoP).
- A community survey reporting the need for discussions on Agile, in-kind contributions, RFP practices, and deliverable management.
- Technology budget and feasibility study training.
- OCIO's involvement in advisory engagements.
- The OCIO's past and present efforts to enhance project success, share observations and promote continuous learning.

Lessons learned/leading practices

The OCIO shares leading practices in three recently published white papers. The three documents are posted to the OCIO website:

- [Agile for non-software projects](#).
- [Death by bullet points whitepaper](#) (how to effectively use bullet points in presentations).
- [How to respond to QA readiness assessment](#).

Project Management Community of Practice

Highlights from the Project Management Community of Practice (CoP) over the last six months include a new project management template, training sessions and a survey regarding future topics for the CoP.

Templates

The CoP offers project management templates to enhance best practices

- The most recently published template, the [Status report template,](#) aims to improve the quality and consistency of status reports by including sections for reporting on overall project status, scope, schedule and budget.
- More than 20 previously published project management templates are also highlighted.

Training

In September 2023, the IT Project Management Community of Practice (CoP) event focused on technology budget matters and addressed common queries, covering aspects such as:

- Getting started with a technology budget.
- Gated vs non-gated funding differences.
- Crossing a biennium within the budget tracking.

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Also in September 2023, training was provided on best practices for establishing and managing feasibility studies. The session included:

- A comprehensive overview of the feasibility study process, highlighting the key aspects of "Who, What, Why, and When."
- Insights and lessons learned from previous feasibility study projects
- Additional guidance is currently in development to assist agencies with conducting cost-benefit analyses.

Community survey

The CoP, based on a community survey, found key interests in:

- Agile project management for non-software projects.
- Incorporating sprints in waterfall projects.
- Gated funding deliverables.
- Shifting oversight to a partnership model.

To address these, the CoP will host discussions and events, fostering knowledge sharing and collaboration.

Additional engagement by OCIO on projects

OCIO is engaged in supporting the project from the kickoff meeting through the life of the project. For example:

- OCIO incorporates best practices into project kickoff meetings.
- OCIO includes a standard agenda item during project steering committee meetings.

Addendum

This section contains supplemental information for the WaTech Best Practices Summary Report.

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Report purpose

The reporting period for this edition of the best practices report is April 2023 through October 2023. This report:

- Highlights the OCIO's efforts to disseminate lessons learned and leading practices in project management through various resources and events. The focus includes recently published white papers. The white papers topics include Agile for non-software projects, the effective use of bullet points in presentations and how to respond to a quality assurance readiness assessment.

- Summarizes key highlights from the Project Management Community of Practice (CoP) events over the past six months.

- Discusses a survey the OCIO used to gather valuable input from the community of practice, which indicates the need for further discussions on topics such as Agile project management, in-kind contributions, RFP best practices and managing deliverables.

- Recaps technology budget training and feasibility study training sessions, shedding light on their significance and benefits. These sessions provided practical guidance and insights to enhance project management and feasibility assessment processes.

- Discusses OCIO's involvement in advisory engagements, including steering committee meetings and presentations to other departments and programs.

- Highlights the OCIO's past and present commitment to incorporating best practices into project kickoffs and offering continuous support for projects. The aim is to establish a strong foundation for project success and develop mitigation strategies based on real-world experiences.

- In summary, the OCIO's dedication to knowledge sharing, training, and community engagement underscores its commitment to improving project management practices and ultimately enhancing the success of IT projects across the state.

Lessons learned/leading practices

This section of the report summarizes some of the lessons learned and leading practices published as white papers on the OCIO website.

Agile for non-software projects

[Agile for non-software projects whitepaper](#)

Agile is an approach to software development that emerged in the 1990s and is an alternative to the traditional software development approach known as Waterfall.

Although the principles of Agile were originally developed for software, Agile principles and methods can be applied to non-software projects. The whitepaper uses a feasibility study as a case study.

Topics include:

- **Sprints** - With Agile, a project is broken down into smaller, incremental goals called sprints. The whitepaper gives examples of sprint-like goals for non-software projects.
- **Minimum viable product (MVP) -** A minimum viable product (MVP) is a version of a product with just enough features to satisfy early customers and provide feedback for future development.
- **Agile team roles -** In each Agile team, there are several important team roles including product owner and scrum master.
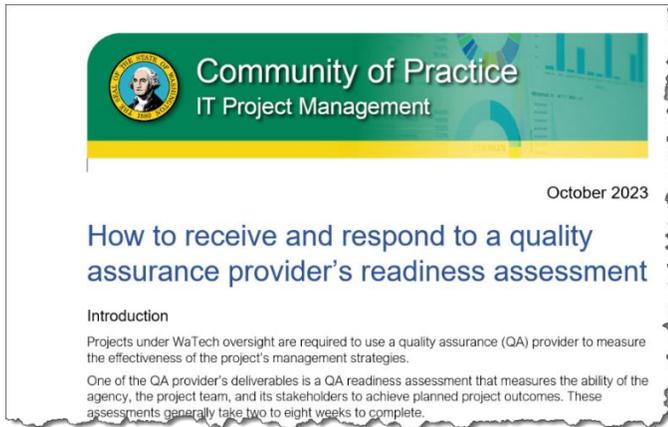
Death by bullet points

[Death by bullet points whitepaper](#)

Do you secretly wish that the next person hired in your organization does NOT know how to use PowerPoint? If you have ever sat through a presentation of 100 slides in black and white—and with each bullet point read word-for-word—this whitepaper offers some hope.

The whitepaper recommends various tips including:

- **Bullet point length** – "6 by 6" guideline.
- **Presentation length** – 15 slides/20 minutes.
- **Use of different visual elements** – For example, animated bullet points and graphics.

How to respond to QA readiness assessments

[How to respond to QA readiness assessment whitepaper](#)

Projects under WaTech oversight are required to use a quality assurance (QA) provider to measure the effectiveness of the project's management strategies.

- One of the QA provider's deliverables is a QA readiness assessment.
- Agencies are required to respond to the QA readiness assessment findings as part of the investment approval process.
- This whitepaper offers recommendations on how to respond to the readiness assessment. Topics include:
  - The QA policies, standards, and guidelines that project teams should be familiar with.
  - How to collaborate with the QA provider.
  - How to respond when the project team disagrees with QA findings.

Project Management Community of Practice

The statewide IT Project Management Community of Practice (CoP) was established in early 2021. The CoP is guided by an engaged advisory board that consists of five members representing five different agencies. It was created to promote a network of peers and foster the exchange of lessons learned, best practices and resources to improve IT project success.

Today community membership has grown to over 200 individuals representing 36 state agencies. During this period the CoP continued its support through template development, training and community surveys.

Templates

The CoP offers project management templates to enhance best practices.

- The most recently published template, the [Status report template,](#) aims to improve the quality and consistency of status reports by including sections for reporting on overall project status, scope, schedule and budget. It also defines stoplight indicators (red, yellow, green) for project status, covers recent achievements and upcoming activities, and addresses key risks/issues/decisions. This template helps to highlight important project milestones and provides information on project spending.

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- Previously published projects templates are located on the OCIO [IT Projects](#) page. These include:
  - Business Case
  - Feasibility Study
  - Project Charter
  - Staffing Plan
  - Project Team RACI Matrix
  - Project Initiation Checklist
  - Project Management Plan
  - Benefits Realization Plan
  - OCM and Communications Workbook
  - Organizational Change Management
  - Communications Management Plan
  - Risk and Issue Management Plan
  - Kickoff Meeting Agenda
  - Deliverables Register
  - Deliverable Quality Review and Acceptance Form
  - Project Status Report
  - Status Meeting Agenda
  - Project Change Management Plan
  - Project Change Request Form
  - Project Change Request Log
  - RAID Log
  - Issue Impact Analysis Form
  - Post Implementation Review Report
  - Closeout Checklist

Trainings

The CoP provides community support through training sessions. Two training sessions offered during the reporting period were:

- The [Technology Budget training](#) explains the purpose of a technology budget, including tracking, monitoring, analyzing and forecasting expenses versus funds. It covers essential elements of a project budget, such as Planned vs. Contract, burn rates, and reporting types. It delves into various expenses like vendor services, software, staffing, data, and more. Funding sources like operating budget, budget proviso, IT pool, and federal grants are discussed. Attendees gain insights into why technology budgets are essential, practical tips, and a comprehensive understanding with real-life examples.

- The Feasibility Study Training defines a feasibility study as an evaluation of proposed alternatives to determine their technical, organizational and economic feasibility within an organization's constraints. It outlines the benefits of feasibility studies, including clarity, decision support and cost/benefit analysis. The training explains the different project tiers and when a feasibility study is needed. It identifies key stakeholders like the Agency, OCIO, OFM, and PMPs and discusses lessons learned, both in terms of people and processes. Attendees come away with an understanding of feasibility studies, their importance, components, and other valuable insights.

Community survey

In response to a community survey, the CoP has identified several key areas of interest:

- **Agile project management for non-software projects -** Most respondents expressed a strong interest in Agile project management practices, specifically for projects outside the realm of software development. This indicates a demand for insights into adapting Agile principles to various project types.

- **Implementing sprints in waterfall projects -** Another notable topic of interest is the

implementation of sprints within traditional waterfall project management approaches. This suggests a desire to explore hybrid project management methods.

- **Gated funding deliverables -** Respondents are keen to receive additional information about the specific deliverables required during the gated funding process, underlining the importance of understanding and meeting funding requirements.

- **Shifting oversight to a partnership model -** There is a desire within the community to work with senior staff to transform the perception of oversight from a purely enforcement role to a collaborative partnership. This reflects a shift toward a more cooperative and supportive approach.

In response to these insights the CoP plans to organize future discussions and community events. These actions aim to address the community's expressed interests and foster knowledge sharing and collaboration in these critical areas of project management.

Additional engagement by OCIO on projects

Project kickoffs and operations

In 2023 the OCIO and Project Management Professionals (PMPs) maintained their commitment to incorporating best practices into project kickoff meetings. Moreover, PMPs have taken on a pivotal role in offering continuous counsel and support for some of the most significant state projects to date. The aim is to lay a robust groundwork for project success from the very beginning and formulate mitigation strategies based on valuable real-world experiences.

Advisory engagements

In many projects and programs under oversight, the OCIO includes a standard agenda item during steering committee meetings. This agenda item is dedicated to the presentation of risks identified by the OCIO and the sharing of project management best practices. Our team of oversight consultants and PMPs who are assigned to these projects actively engage in various meetings and committees, offering their insights and consultations throughout the entire project lifecycle.

The OCIO has taken the initiative to present valuable insights and knowledge to key stakeholders. These include presentations made to other departments and programs. During these presentations we shared our observations and lessons learned from substantial programs and projects that span across the enterprise. This knowledge exchange aids in promoting a culture of continuous learning/improvement and informed decision making.

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Addendum

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Contact

Questions regarding this report can be directed to Richelle Glascock and Diana Martin.

Archived reports

Prior reports are published on the OCIO website on the OCIO Reports page. Prior videos and published material can be found on the IT Projects page under the "Project Resources" and "Whitepapers" headings.

Report authorization

Section 150(1)(ii) directs the PMPs to:

Consider statewide best practices from the public and private sectors, independent review and analysis, vendor management, budget and timing quality assurance and other support of current or past IT projects in at least Washington state and share these with agency IT stakeholders and legislative fiscal staff at least twice annually and post these to the statewide IT dashboard.