WaTech Best Practices Summary

June 2023

Office of the Chief Information Officer

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Executive Summary

The 2022 supplemental operating budget provides funding to WaTech's Office of the Chief Information Officer (OCIO) for master-level information technology (IT) project management partners (PMPs) to provide critical support, consultation and advice to agency projects under OCIO oversight.

This report highlights the efforts made to date by the OCIO to improve the sharing of information, including:

- IT project management lessons learned repository.
- Project management community of practice.
- Integration into project activities.
- Project management guides, templates and sample documents.
- Technology Services Board presentations.

The reporting period for this edition of the best practices report is October 2022 through April 2023.

This report's addendum provides links to previously published best practices reports, which are available online and can be accessed in one or more of the published summary reports.

Critical to Quality Lessons Learned

Some common lessons-learned themes that presented themselves during this reporting period include:

- Early engagement – Early engagement among the OCIO, the Project Management Partners (PMPs) and agency project leadership can be helpful. For example, PMPs can recommend project management best practices into procurement-related artifacts (e.g., requests for proposals).

- Project management best practices are not exclusive to those commonly labeled "project" management. For example, organizational change management (OCM), testing management, vendor management and contract management are some areas that are critical to successfully managing a project at different project lifecycle stages.

- Leading practices – Although this report uses the term "best practices" in its title and throughout the report text, it is probably better to regard these practices as "leading practices" for a least a couple of reasons:

  o Adopting a leading practice is not always practical (e.g., due to time or cost constraints). For example, as part of an ongoing engagement, the PMP recommended that the team draft system requirements following a "user story format" (e.g., "As an ABC user, I want the system to do XYZ, so that…") vs. the traditional way of writing system requirements (e.g., "The system shall…"). Because the agency is under the constraints to finish the feasibility study by the end of the fiscal year, the agency sponsor did not think the team had time to define the requirements in the user story

format. They agreed with the value of user story requirements; but it is not the "best" approach for them at this time.

- o It would be a bit presumptuous to think that a PMP (or almost anyone) knows what is best. PMPs offer a lot of valuable experience and knowledge, but like those that they work with, they continue to seek out and find better leading practices.

Community of Practice Highlights

The following are two highlights from CoP events in the last six months.

Fun while learning

- At a CoP event in November 2022, the participants played their own version of "Name that Tune."

- The facilitator compiled a playlist of songs and played a 10-second snippet of a song.

- First volunteer to raise their hand was called on to name the tune **AND** describe how it applies to project management.

- Other participants chimed and shared project management stories and learning opportunities as they applied to the theme of the song on the playlist.

- Discussion lasted about two to five minutes for each song. Overall length of the game was about 40 minutes.

- Participants learned something from their colleagues in a nontraditional and fun way.

Getting to know CIO leaders

- At a CoP event in February 2023, the CoP organized a panel discussion among a group of state CIOs titled "The value of project management and the next frontier for project management transformation."

- Invited CIO panel members included:
    - o Bryce Carlen, Department of Revenue.
    - o Chris Lamb, Office of Financial Management.
    - o Dave Marty, Department of Labor & Industries.
    - o Jerry Britcher, Health Care Authority.

- In addition to the panel discussion, the CIOs fielded questions from the audience. This provided attendees an opportunity to ask questions and introduce themselves to executives they might otherwise not meet.

IT Project Management Lessons Learned

The available collection of IT Project Lessons Learned continues to serve as a vital repository of knowledge for project managers. It provides a tool for project managers and other project stakeholders to learn from the experiences of others to help reduce project risk. The repository is searchable by project type, project phase and category.

Categories include:

- Agency readiness.
- Communications and stakeholder management.
- Cost management.
- Executive sponsorship and governance.
- Implementation approach and methodology.
- Organizational change management.
- Procurement, contract and vendor management.
- Project management and project controls.
- Project team and human resource management.
- Schedule management.
- Scope management.

Case Study – Upfront deliverable expectations lead to better deliverables

A recent case study from the PMPs offers a "lesson learned" on the value of setting expectations before a deliverable is drafted.

Scenario

A project team engaged a new contractor to conduct a feasibility study. As part of the RFP process, the project team required the vendor to prepare a deliverable expectations document (DED) prior to drafting all deliverables.

The purpose of a DED is to outline the expectations for approval of a project deliverable. The DED content includes:

- Deliverable production team roles and responsibilities.

- Deliverable reviewers and approvers.

- Deliverable development and review process (e.g., deliverable events, such as draft submission, and schedule).

- Deliverable description and requirements.

    o Description narrative.

- o Requirements.
  - o Acceptance criteria.
- Annotated outline of the deliverable.

Lesson(s) Learned Applied

For each deliverable, the steps applied are:

- Prepare DED - Vendor prepares the DED before the scheduled timeframe for producing the deliverable (e.g., one or two weeks in advance).
- Review DED - Deliverable stakeholders (deliverable author, vendor PM, agency sponsors, agency project manager, oversight consultant [or designee such as the project management partner], and QA provider) conduct a joint review of the DED. For this project, the review meeting is typically one to two hours.
- Revise and iterate on DED – Vendor and project team iterate on DED until it is ready for approval.
- Approve the DED – Authorized approver directs the vendor to prepare the deliverable per the DED.
- Prepare the deliverable – Vendor prepares drafts of the deliverable.
- Review deliverable – Stakeholders review the deliverable, including confirming the deliverable aligns with DED specifications (including, description, requirements and acceptance criteria).
- Revise and iterate on deliverable – Vendor and project team iterate on deliverable until it is ready for approval.
- Deliverable approved.

Outcomes

The outcomes of this leading practice for the project are:

- Increased frequency of meeting stakeholder expectations for the deliverable.
- Less time overall to iterate on drafts of the deliverable – Significant positive return on investment (saved time and money) through the DED process.
- Better quality of deliverables.

Similar to how system requirements defined in advance help project teams deliver better systems, deliverable expectations defined in advance for written deliverables help this project team deliver better deliverables.

Project Management Community of Practice

The statewide IT project management community 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. Work initiated or continued this period by the CoP includes on-demand videos, whitepapers, peer networking and discussion boards.

On-Demand Videos

The complete library of recorded learning sessions sponsored by the statewide IT project management community of practice is now available online. This includes:

- IT PM CoP Event CIO Panel: The Value of Project Management (February 2023)
- Skills for IT Oversight Process (September 2022)

This library continues to grow with each new recorded learning session.

Whitepapers

The IT project management community of practice publishes quick three- to10-minute "morning coffee break" reads on targeted best practices.

Peer Networking

The IT project management community of practice holds regular networking events for members and guests. These events provide project management professionals an opportunity to expand their peer network and exchange best practices and lessons learned in support of successful project outcomes.

Discussion Boards

The IT project management community of practice also hosts a Microsoft Teams site where members are invited to post to live discussion boards. Discussion topics have included how to mitigate project risks, professional development and training opportunities, as well as job postings.

Additional Engagement

In addition to capturing lessons learned from projects and supporting the CoP, the PMPs are engaged in other ways that advance project management and related leading practices.

Advisory Engagements

For most projects and programs under oversight, the OCIO has a standing agenda item on steering committees to present OCIO-identified risks and project management best practices. The oversight consultants and PMPs assigned to projects also participate in other meetings and committees to provide input and consultation throughout the project lifecycle. In addition, the OCIO presented to the OFM One Washington Program, the L&I's Workers' Compensation System Modernization project, and the Health and Human Services Coalition on areas of risk observed and learned from other large programs and projects across the enterprise.

Project Kickoffs and Operations

During 2023, the OCIO and PMPs continued to integrate best practices specific to the type of project into project kickoffs. In addition, PMPs have been positioned to provide ongoing advice and guidance to some of the largest state efforts to date. This is intended to establish a strong foundation for project success from the outset and establish risk response strategies based on real-life lessons learned.

Technology Services Board

The OCIO and project management partners provide a quarterly presentation series to the Technology Services Board (TSB). This series is intended to promote and advertise best practices in project management—and solicit feedback from board members with broad industry experience. To date, the OCIO and PMPs have presented on the topics of:

- Risk management and mitigation.
- Budget and resource management.
- Vendor management.
- Integrated scheduling.

Contact

Questions regarding the WaTech Best Practices Summary Report can be directed to: Richelle Glascock and Deanna Brocker.

Addendum

This section contains supplemental information to the *WaTech Best Practices Summary* report.

Archived Reports

Many of these resources referenced in this report, including prior reports, are published–and hyperlinks to them provided–on the OCIO website on the IT Projects page and 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.*