WaTech
Washington Technology Solutions

Annual independent recommendations on oversight of IT projects

Dec. 31, 2024

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Introduction and purpose

This 2024 annual report highlights the independent observations and recommendations made by Project Management Partners (PMPs). As mandated in Washington State Senate Bill 5950, Section 153(1)(c), "The staff or vendors will…Provide independent recommendations to legislative fiscal committees by December of each calendar year on oversight of IT projects to include opportunities for accountability and performance metrics."

The recommendations in this report are informed by extensive engagement with WaTech, partner agencies, and research into project management best practices, reinforcing a cohesive and agile approach to major IT project oversight across Washington state.

This report highlights 2024 achievements and outlines a strategic vision to foster a collaborative, results-driven project management environment across Washington state's IT initiatives.

In Section 1 below, we share observations and targeted recommendations designed to enhance efficiency, transparency, and alignment across projects, with the shared goal of fostering successful project outcomes and sustained value for Washington state.

In Section 2, we showcase progress toward the goals outlined in the 2023 report, which has built a strong foundation for WaTech's oversight capabilities. These advancements include the creation of standardized tools and training materials, enhanced agency collaboration, and refined key performance indicators (KPIs), all of which support a robust oversight framework.

In Section 3, we outline high-impact priorities for 2025, focusing on enhancing project health metrics, expanding training for project managers and executive sponsors, and streamlining resources to reinforce WaTech's collaborative support for agency partners.

Section 1: 2024 new observations and recommendations summary

1. **Observation:** Enhancing KPIs to further measure the positive impact of Oversight Consultant (OC) and PMP contributions will reinforce the success of agency projects. Sharing these metrics with agency leadership and other interested parties will strengthen agency buy in, foster collaboration, and illustrate the value of the OC and PMP functions in driving successful project outcomes.

   Background: WaTech leadership, agency partners, and other interested parties value the contributions of OCs and PMPs in supporting agency project success. Enhancing and sharing KPIs further positions OCs and PMPs as strategic partners, offering targeted guidance and advisory services that directly benefit agency projects and promote shared accountability.

   Impact: Enhanced KPIs shared with agencies and interested parties throughout each engagement will highlight the positive impact of OC and PMP support, showing their role as valued partners in the project's success. Clear, measurable KPIs will reinforce WaTech's commitment to transparency, helping agencies recognize the value of collaboration and the strategic benefits of oversight engagement.

Recommendations:

a. Refine KPIs to highlight OC and PMP contributions to delivering projects on time, within budget and to the desired quality standards, ultimately achieving business outcomes. Work with WaTech personnel to align on the specific metrics and measures to ensure the metrics are beneficial and measurable.

b. Host collaborative sessions with agency partners to share insights on the OC and PMP function, collect KPI information via surveys and other agreed upon methods such as the lessons learned repository, and budgetary analysis. Review KPI results, highlight successful project outcomes, and incorporate valuable feedback mechanisms. Maintain KPI information on a dashboard.

c. Expand the reach and frequency of satisfaction surveys to capture a broader perspective on the impact of OC and PMP contributions to program and project outcomes.

d. Highlight improvements in compliance resulting from OC and PMP's partnership with agencies.

e. Document and communicate improvements in time-to-compliance achieved through OC and PMP partnerships, reinforcing WaTech's commitment to streamlined, efficient project support.

2. **Observation:** Building on the progress made in clarifying roles among OCs, PMPs and agency project managers (PMs) offers a valuable opportunity to further enhance collaboration and support effective project delivery.

Background: As a result of the Oversight Transformation initiative, the Oversight team has made significant progress in clarifying roles and responsibilities of OCs, PMPs and agency project managers (PMs) across all project stages, from project onboarding to closeout. This role clarity has strengthened the team's ability to deliver tailored oversight. Increased role standardization has introduced new layers of consistency within the oversight team, reinforcing WaTech's commitment to effective and efficient project support.

Impact: The clarified roles and responsibilities have fostered positive, productive collaboration with agency partners, who frequently seek out guidance from OCs and PMPs to support their project goals. This structure highlights the essential contributions of OCs and PMPs, ensuring agencies receive consistent, high-quality support. By establishing clear expectations, WaTech has enhanced overall efficiency by streamlining activities and preventing overlap. Standardized roles now also support a seamless onboarding process for new PMPs, OCs and agency PMs, enabling them to quickly integrate, identify project risks proactively, and contribute to successful and predictable project outcomes.

Recommendations:

a. Continue refining and utilizing the living RACI (responsible, accountability, consulted, informed) matrix to document roles and responsibilities, fostering transparency and accountability in project support.

b. Hone the standardized onboarding procedures for new OCs, PMPs, and agency PMs to support seamless integration and productive collaboration from the state.

c. Expand onboarding materials for agency project staff to showcase the valuable services provided by PMPs and OCs. Conduct informational overviews with agencies as new projects come under oversight to reinforce understanding and alignment.

Observation: Emphasize the approach to assessing project health and overall risk to be two separate reporting requirements and strengthen alignment and transparency across all interested parties. Further refinement of evaluation criteria and processes will increase consistency, support informed decision making, and enable effective monitoring of OC and PMP contributions.

Background: The Oversight team has introduced a standard color-coded system to assess project risks, fostering greater transparency and clarity in status reporting. This standardized approach provides a consistent overview of project progress, fostering positive collaboration with agency partners. Building on this system's strengths, the Oversight team will continue refining the evaluation criteria to promote effective, measurable outcomes.

Impact: The standardized assessment system empowers agency partners with clear, actionable insights into project risk levels, supporting proactive risk management. By providing transparent expectations, this system guides projects towards lower-risk statuses, ultimately strengthening oversight efforts. Additionally, improved clarity and documentation will simplify onboarding for both WaTech staff and agency partners.

Recommendations:

a. OCs and PMPs should continue evaluating the effectiveness of the color-coded system for project health and risk as two separate reporting requirements on the Washington State Information Technology (IT) Project Dashboard.
b. Refine definitions for project health criteria to support consistent and transparent assessments.
c. Create a formalized framework to support streamlined onboarding for new PMs, OCs and PMPs.
d. Enhance documentation of the assessment system to support the onboarding of agency partners and new WaTech staff.

3. **Observation**: Refresh and optimize the lessons learned repository to enhance accessibility, encourage continuous learning and support best practices across projects.

Background: The oversight team regularly receives inquiries from agency partners regarding a central repository for lessons learned. While the existing repository is a robust collection of data formatted in an Excel spreadsheet and maintained by the PMPs on a quarterly basis, it lacks organization and structure. Optimizing its user experience (UX), ensuring timely updates, improving accessibility and searchability and training staff on content management will significantly enhance the repository's utility. This improved repository will serve as a key tool for WaTech and agency partners, supporting the adoption of best practices, risk mitigation and streamlined project processes.

Impact: An optimized lessons learned repository will strengthen WaTech's support for continuous improvement and knowledge sharing across projects. By providing a centralized resource for project insights and best practices, the repository empowers project teams to avoid common

challenges, accelerate success, and enable knowledge transfer, supporting WaTech staff and agency partners in mitigating risks and enhancing project outcomes.

Recommendations:
a. Conduct a comprehensive audit of the lessons learned repository to assess completeness, accuracy and relevance, ensuring it meets current project needs.
b. Work with WaTech's Web Services team to develop an interactive platform that enhances user experience, allowing the user to search by key words, projects, project type, etc. Develop a mechanism that tracks user engagement with the lessons learned repository.
c. Implement a process to ensure lessons learned are added to the repository in a timely manner through project lifecycles. Establish clear expectations for adding lessons learned to the repository and ensure accountability by assigning specific responsibilities and tracking adherence.
d. Partner with WaTech's Communications team to develop a strategy for effectively promoting the repository to target users, ensuring widespread adoption and engagement.

4. **Observations:** Expand and enhance the IT Project Resources page with Project Management Office (PMO) templates related to budget, schedule, and SOWs to drive consistency across projects. Add agile templates for daily scrums, sprint backlogs, and retrospectives, and vendor management tools like vendor checklists, performance scorecards, and exit checklists. Add white papers, instructional resources, and conduct regular audits to ensure relevance and address any resource gaps.

Background: Agency partners, particularly new ones, have expressed interest in agile templates, guidelines, and instructional resources to support the 701 Requirements. This feedback underscores an opportunity for PMPs to enhance the IT Project Resources page with updated agile content, supporting partners in efficiently meeting project requirements.

Impact: An enhanced, centralized resource page will streamline access to agile templates and guidance, supporting efficient and consistent project management across state IT. Up-to-date resources will reinforce WaTech's credibility as a reliable source for project support, helping agency partners access the best practices and tools they need to meet project requirements effectively.

Recommendations:

a. Evaluate and update the IT Project Resources page, incorporating new, field-tested agile templates, underscoring WaTech's commitment to quality and reliability.
b. Guide new teams to the most current templates, resources and best practices available to support their project goals.
c. Regularly assess the usage and effectiveness of templates to identify areas for improvement, ensuring resources meet evolving project needs.

Section 2: Progress on previous observations and recommendations

The content below represents observations and recommendations from the 2023 annual report, along with updates on WaTech's progress toward addressing the recommendations.

1. **Observation:** Agencies often engage WaTech as part of compliance rather than a partner in the planning of their projects.

   Progress in 2024:

   a. Developed an <u>IT Project Oversight – Overview presentation to strengthen understanding of WaTech's role as a strategic partner</u>. The presentation covers:
      - The purpose and benefits of oversight.
      - The types of support available to agencies.
      - Key areas of focus, including governance and health assessments.
      - An overview of the IT dashboard.
      - Direct links to IT Project Resources and relevant white papers.
   b. The PMP and OC team partnered with new agencies, including DOL, HCA, DSHS, DNR, and DOT, to streamline and enhance the project planning process. This collaboration contributed to a notable reduction in planning time, highlighting the efficiency and value of WaTech's support.

   c. Created an [outreach plan](#) that has positively strengthened WaTech's reputation as a collaborative and accessible partner to agencies

2. **Observation:** KPIs for projects under oversight are often not collected, inadequately defined or impractical. This includes KPIs that are—or should be—reported on the Washington State IT Project Dashboard.

   Progress in 2024:

   a. Developed a [701 Charter Checklist](#) to support project managers in establishing well-defined, strategy-aligned metrics. OCs and PMs use this checklist to ensure individual project KPIs meet the following standards:

      - Alignment with project goals
      - Relevance to specific teams and roles
      - Conformity with organizational standards
      - Comprehensiveness
      - Credibility and reliability
      - Cost-effective collection and processing
      - Seamless integration with existing systems
      - Compatibility with other data
      - Clarity and understandability

   b. During project charter reviews, OCs and PMPs provide constructive guidance to program and project managers on defining comprehensive, practical metrics. These metrics include:

- Formula: How the KPI is calculated.
- Data source: Where the data originates.
- Unit of measure: The metric type (e.g., percentage, ratio).
- Collection and reporting frequency: How often the data is gathered and reported.
- Baseline: The current performance level.
- Target: The desired performance level.
- Threshold: The acceptable performance level.
- Owner: The individual accountable for the KPI.
- Authorized by: The person who approves the KPI.

c. To promote consistent metric tracking, OCs, PMPs and PMs collaborated to update the project dashboard, incorporating KPIs that reflect progress and project alignment.

3. **Observation**: IT projects, in general, fail often. And the impact of failures is worse for large projects.

Progress in 2024:
a. OCs and PMPs collaborated with program and project managers to develop hybrid project plans and templates, incorporating agile and traditional methodologies to support adaptable and successful project delivery. These plans include:

- Clearly defined sequential phases.
- Smaller, iterative cycles for early delivery of working products.
- Continuous improvement through regular feedback and retrospectives.
- Risk reduction through early identification of issues.
- Improved collaboration and teamwork.
- Increased efficiency.

4. **Observation:** Lack of standard oversight project process training for project managers and business sponsors.

Progress in 2024:
a. To standardize oversight training, the oversight team developed an IT Oversight and Resources Handout. This resource aims to:

- Provide a comprehensive understanding of the oversight process for project teams.
- Equip project teams with the necessary tools, resources and knowledge to confidently and effectively navigate their roles.

b. To provide training across all project phases, the oversight team established the Washington state IT Project Management Community of Practice (CoP). This community offers state IT PMs a platform to share best practices and lessons learned on topics, including:

- Procurement processes
- Quality assurance
- Leveraging QA, WaTech Oversight and Strategic Advisory Services, and sponsors
- Facilitating security design reviews
- Preparing technology budgets
- Delegating authority

- Organizing project artifacts
- Preparing decision packages
- Conducting feasibility studies
- Overcoming role-specific challenges
- Making informed decisions
- Other guidance identified by the community

Section 3: Looking toward 2025

In 2025 PMPs will continue to support Washington state IT projects in collaboration with agencies, WaTech, the Legislature and OFM. Our commitment to project success remains strong.

PMP plans for 2025 include:

- Enhancing project health and risk assessments to reduce ambiguity, ensuring KPIs effectively measure project success and alignment.

- Strengthening and expanding the lessons learned repository.

- Improving project outcomes by delivering training in executive sponsorship, governance, vendor management and integrated project scheduling.

- Implementing metrics to measure PMP process effectiveness and contributions to project success.

- Supporting strategic initiatives, including simplifying the technology budget template and creating a knowledge repository for commonly used enterprise solutions.

- Fostering long-term success through continued advisory services and continued growth of the Community of Practice.

Contact

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