



Washington's Consolidated Technology Services Agency

Technology Services Board

Quarterly Meeting
December 14, 2021
9:00 a.m. – 11:00 a.m.

Agenda

TOPIC	LEAD	PURPOSE	TIME
Welcome and Introductions	Bill Kehoe	Introductions	9:00
Approve Minutes from September 14 Meeting	Bill Kehoe	Approval	9:09
Standard 182.20.10 - Email Naming Standard UPDATE	Nick Stowe Scott Lindekugel Karen McLaughlin	Approval of updates to Standard	9:10
Program Status – One Washington <ul style="list-style-type: none"> • Introductions <ul style="list-style-type: none"> ○ Scott Nicholson, Executive Director ○ John Anderson, ISG-P/Executive Director for Technology Transformation • Agency Remediation Status and Future Work – Manoj Verma, Director of System Remediation • Q&A 	Amy Pearson	Status of program and discussion	9:20
IT Project Best Practices and Lessons Learned: Vendor Management <ul style="list-style-type: none"> • Nicole Simpkinson, Assistant Director, Office of the CIO • Stacy Steck, Project Management Partner, FirstRule 	Nicole Simpkinson	Share lessons learned related to vendor management	9:50
Subcommittee Structure	Nick Stowe	Board member discussion	10:20
Public Comment			10:40



Current TSB Members

Industry Members

Butch Leonardson – Retired CIO
Paul Moulton – Retired CIO

Legislative Members

Rep. Matt Boehnke – House R
Rep. David Hackney – House D
Sen. Joe Nguyen – Senate D

Executive Branch (Agency Directors)

Bill Kehoe – State CIO & Chair
David Danner – UTC
Tracy Guerin – DRS
Vikki Smith – DOR

Other Government

Viggo Forde – Snohomish County

Vacancies:

Industry Representative
Senate Representative
Labor Union Representative

Members present

Members absent

Approve 09/14/2021 Minutes



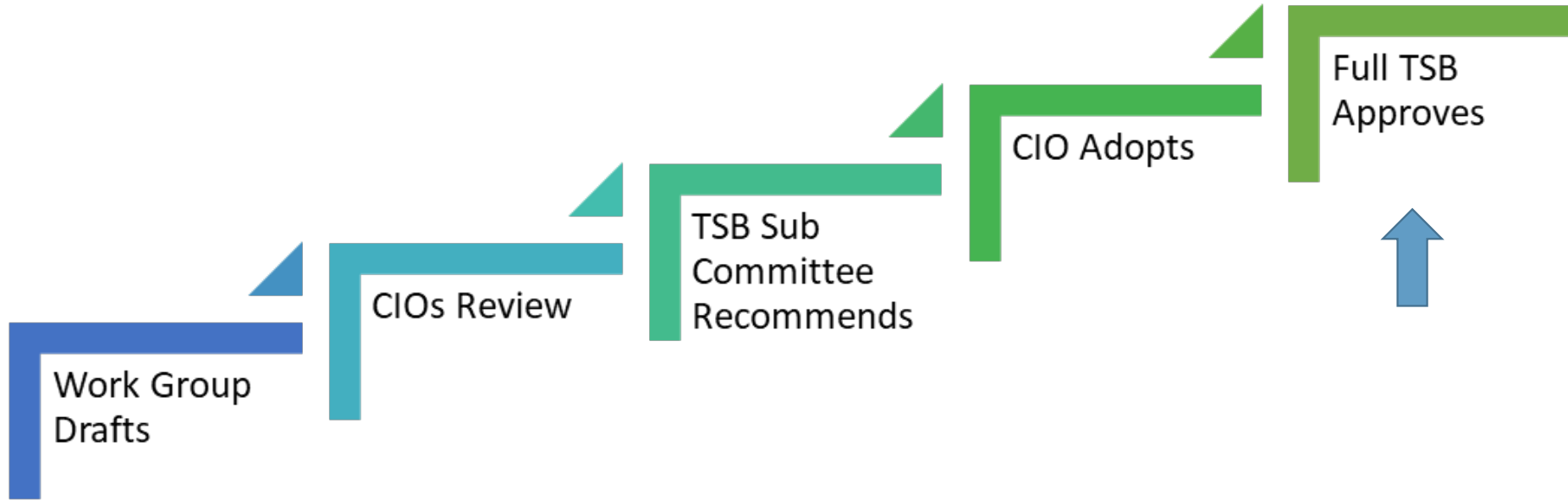
Standard 182.20.10

Email Address Naming Standards

Technology Services Board Meeting
December 14, 2021

Nick Stowe, Chief Enterprise Architect
Scott Lindekugel, State Enterprise Architect
Karen McLaughlin, M365 and Identity Architect

Where are we?



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Email Address Naming Standards



Purpose of action

- Request approval for revised Email Naming Standard to align with the current migration to cloud solutions such as Exchange Online/Office 365.



Business case

- This updated standard continues to promote common IT practices needed for cloud adoption and Equity considerations.



Key objectives

- Extend the current standard to include fully qualified login name, SMTP, and Telephony (SIP) attributes.
- Combine the email naming standard and guideline into one document and update based on requirements in Microsoft M365.



Strategic alignment

- Adopting cloud solutions and migrating existing systems to cloud services.
- Adopting shared services for common business solutions and reducing unnecessary operational complexities and costs.



Implementation

- This builds upon an existing standard
- Some agencies may not have the resources or funding needed to meet the required timeline and would require a waiver.



Success criteria

- The Policy is successful if all in scope agencies have met the conditions outlined in this standard or have a plan to become compliant.

Email Address Naming Standards

Timeline	
2015	Current Standard Approved by the TSB
2018- Now	Enterprise Shared Tenant Migrations
April 2021	Email naming standard draft begins
July 2021	Feedback received from SMEs, CIOs, and OFM Diversity, Equity, and Inclusion (DEI). Most of the feedback was around DEI and a couple areas that needed clarifying.
August 2021	Feedback review and incorporated into the next draft
September 2021	Additional Feedback received from the SMEs, CIOs, and OFM DEI and incorporated into the draft.
Nov 2021 – Dec 2021	TSB Policy Sub-Committee, Full TSB



Summary of Feedback

- The standard needs to address DEI. A few specifics include accommodating hyphenated names, transgender, and other use cases where the individual's legal name is no longer being used. A few modifications that were incorporated due to the feedback include:
 - Provided an example for a person with two last names: “**LastName can be one or more LastNames** (Examples: [Person1.Smith@acy.wa.gov](#), [Person2.SmithJones@acy.wa.gov](#).”
 - We added an exemption for those with legal reasons not to show their legal name “Employees where the email address of the individual should be obfuscated for the protection of the individual.”
- Concerns from a few agencies that currently don't meet the standard nor the addition of SIP and UPN.

Questions?

- Motion to approve Standard 182.20.10?



Washington's Consolidated Technology Services Agency

Office of Financial Management One Washington

Technology Services Board Quarterly Meeting
December 14, 2021



One Washington
A Business Transformation Program

Agenda



1. Introductions: John Anderson and Manoj Verma
2. Agency Remediation: Status
3. Agency Remediation: Future Work
4. Q and A



Introductions: John Anderson and Manoj Verma

Scott Nicholson
John Anderson



One Washington
A Business Transformation Program

Agency Systems Remediation: Status

Manoj Verma



One Washington
A Business Transformation Program

Agency Systems Remediation | Numbers

126 Agencies contacted by the program

36 Agencies identified systems impacted by the change

603 Systems identified as being impacted by the change

Total number of impacted systems in core business function

- Financial (323)
- Purchasing and Procurement (74)
- Human Resource (108)
- Payroll (73)
- Budgeting (105)

** Many systems support more than one core business function*

Systems impacted by Phase-1A implementation:

Total Systems	Critical Systems	Very Important Systems	Important Systems
229	19	50	160

Agency Systems Remediation: 30-60-90 Day Plan

30

Learn and Assess

January 17th

GOAL

Learn the current state, what is working well and what are the areas of improvement? Right size the work and develop a team structure to support the work effort

ACTION

- Meet Program leadership team to learn about vision, mission and the strategy
- Meet Project team to learn about the work to date and review existing artifacts
- Meet high impact agencies leaders and authorizing stakeholders (OCIO and QA) to assess gaps and opportunities

OUTCOME

- Clear understanding of the current state of the FDM and remediation activities
- Clarify Integration vs. Remediations
- Approved list of systems (with disposition) that must be remediated prior to go live

60

Design and Implement

February 28th

GOAL

Add resources to the team. In collaboration with agencies and authorizing stakeholders, develop a framework and tools to support and track the progress of remediation activities

ACTION

- Finalize PDs for FTE and work with existing vendor to find adequate resources
- Develop and refine framework/tools to support the remediation activities including user stories, FDM mapping, test scripts etc.
- Form a remediation support work group with representation from impacted agencies

OUTCOME

- Refine team structure, and assign key roles/resources (FTE and contractor)
- Draft baseline schedule/project plan
- Consistent status reporting for remediation activities across the Enterprise

90

Develop, Review and Optimize

April 11th

GOAL

Have an approved baseline project schedule. Progress tracked and reported to the baseline schedule, optimize the process/plan as we learn more

ACTION

- Work in collaboration with all stakeholders (including project team, impacted agencies, authorizing stakeholders, and governance bodies) to get approval of the baseline schedule
- Continue using consistent framework and tools for system remediation activities
- Execute and track progress to the schedule

OUTCOME

- Approved Baseline schedule/project plan, Integrate the plan with overall implementation plan
- Continue developing and refining the system remediations artifacts including user stories, E2E test plan, test script and scenarios

Agency Legacy System Remediation | 30 day Look Ahead



Meet with the leaders from High Impact Agencies to understand their perspective on following:

- Does your Agency understand FDM and have completed mapping of FDM with legacy data?
- Does your Agency have the information required for remediation of the impacted systems?
- Does your agency need pool funding? If yes, have you received or applied for funding?
- How can the Program help your Agency in remediation effort?

Work closely with the Program, BTB, and ESC to have an approved list of impacted systems that must be remediated before going live with the new system (we cannot go live with the new system without remediating these systems)

Validate roles and resources dedicated to support the system remediation effort (State staff and the vendor resources)

Q and A

John Anderson
Manoj Verma



One Washington
A Business Transformation Program

Sharing IT Project Best Practices and Lessons Learned

Vendor Procurement and Relationship Management

Technology Services Board
December 14, 2021

Supporting project success



INDEPENDENT
OVERSIGHT



DIRECT PROJECT
MANAGEMENT
PARTNER SERVICES



PROJECT KICK-OFF
SUPPORT



1:1 CONSULTATION



COMMUNITY OF
PRACTICE



LESSONS LEARNED
REPOSITORY



QUARTERLY / ANNUAL
REPORTS



PROJECT MANAGER'S
GUIDEBOOK



SAMPLE VENDOR
MANAGEMENT &
PERFORMANCE
MEASUREMENT PLANS



DES CONTRACTING
SUPPORT



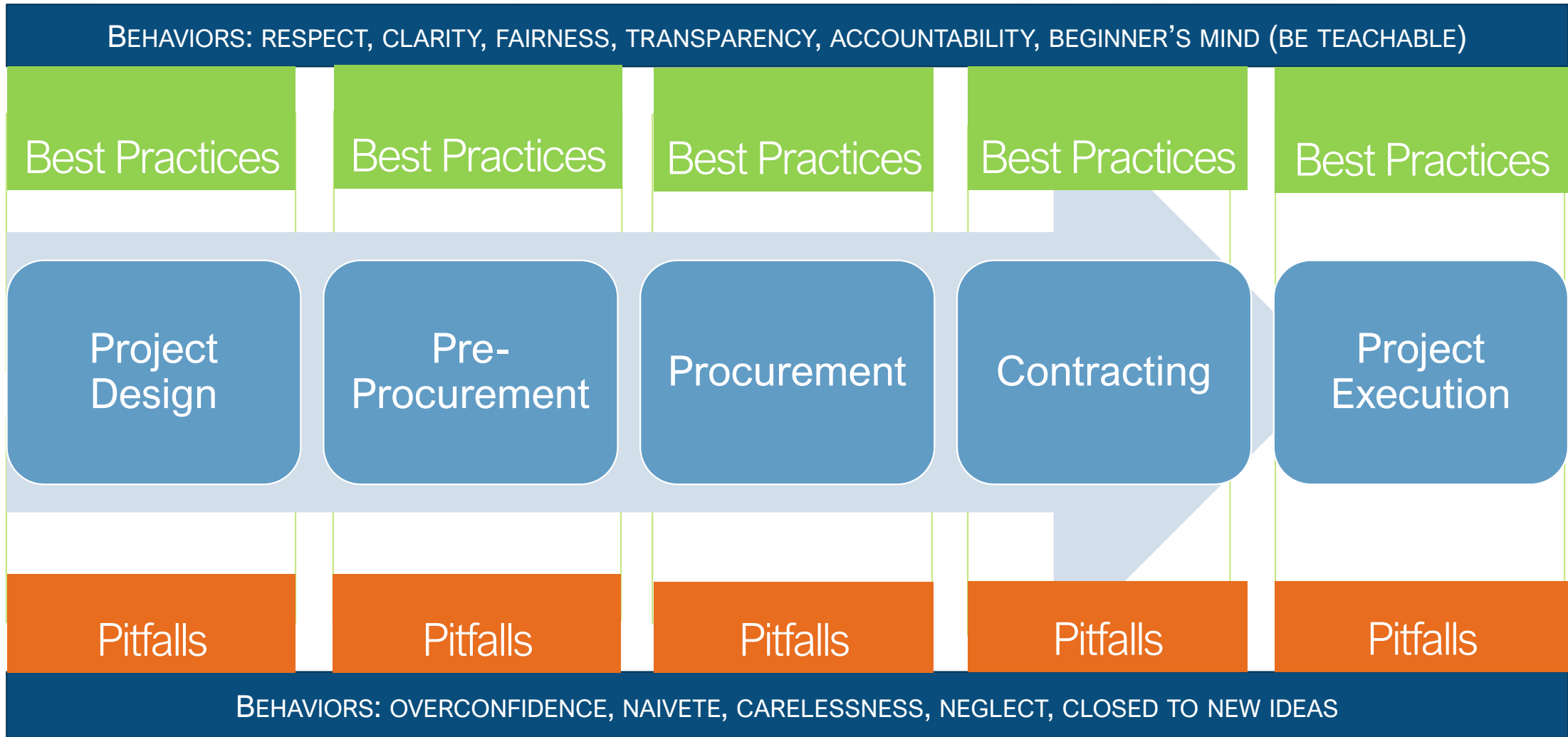
A Focus on Vendor Management



What is vendor management?



Vendor management: Best practice roadmap



Vendor Management Best Practice Roadmap

Behaviors: respect, clarity, fairness, transparency, accountability, beginner's mind (be teachable)				
<p>Best Practices</p> <ul style="list-style-type: none"> Plan for procurement and vendor management Estimate activities based on previous experience 	<p>Best Practices</p> <ul style="list-style-type: none"> Develop Procurement Plan Clarify roles and responsibilities Peer review contract Alert select vend 	<p>Best Practices</p> <ul style="list-style-type: none"> Clear SOW Identify vendor risks Mutually beneficial cost structure Check references Check financial records Robust evaluation guide 	<p>Best Practices</p> <ul style="list-style-type: none"> Establish mutual value proposition Cultivate trust Create schedule of deliverables Establish vendor performance measures Onboard vendor Create communication plan 	<p>Best Practices</p> <ul style="list-style-type: none"> Monitor vendor performance Review deliverables for quality Produce vendor scorecards Periodic supplier risk assessment Communicate performance gaps Engage QA in vendor performance measurement
<p>Project Design</p> <ul style="list-style-type: none"> Demonstrate bias towards vendor(s) Accept vendor estimates as truth Base your performance assumptions on previous interaction with vendor(s) 	<p>Pre-Procurement</p> <ul style="list-style-type: none"> Cultivate unrealistic expectations Release poor quality RFP Abbreviate the timeline for procurement 	<p>Procurement</p> <ul style="list-style-type: none"> Vague statement of work Block input from strategic advisors Don't check on vendor reputation, financials or turnover rates Don't vet proposed staff 	<p>Contracting</p> <ul style="list-style-type: none"> Sign a weak contract Give away leverage Fail to set a regular meeting cadence Assign inexperienced or inappropriate vendor manager 	<p>Project Execution</p> <ul style="list-style-type: none"> Don't address performance issues immediately Don't monitor performance Don't provide feedback Too busy to communicate and cultivate relationship
Pitfalls	Pitfalls	Pitfalls	Pitfalls	Pitfalls
Behaviors: overconfidence, naivete, carelessness, neglect, closed to new ideas				



Vendor management thought leadership - 2021

BEST PRACTICES*

- Prepare for procurement.
- Have a vendor manager review vendor's progress in meeting contractual obligations.
- Enable vendor relationship management.

* Best practices are published quarterly on the OCIO website.

** Lessons learned are published in the IT Project Lessons Learned Repository.

*** Whitepapers are extracted from quarterly and annual reports.

LESSONS LEARNED**

- Procurement vendor relationship management.

WHITEPAPERS***

- Vendor Management Part I
- Vendor Management Part II
- Sponsorship
- Governance



For discussion

- What lessons learned can you share from your experience?
- How can we equip our sponsors to be more successful with vendor management?
- How can we support improved vendor performance in 2022?



What other lessons learned topics are you interested in?

- Risk management and mitigation.
- Budget and resource management.
- Integrated schedule management.
- Agency readiness.
- Communications and stakeholder management.
- Executive sponsorship, governance and decision making.
- Organizational change management.
- Project management and project controls.
- Architecture.
- Others?

Thank you for this opportunity



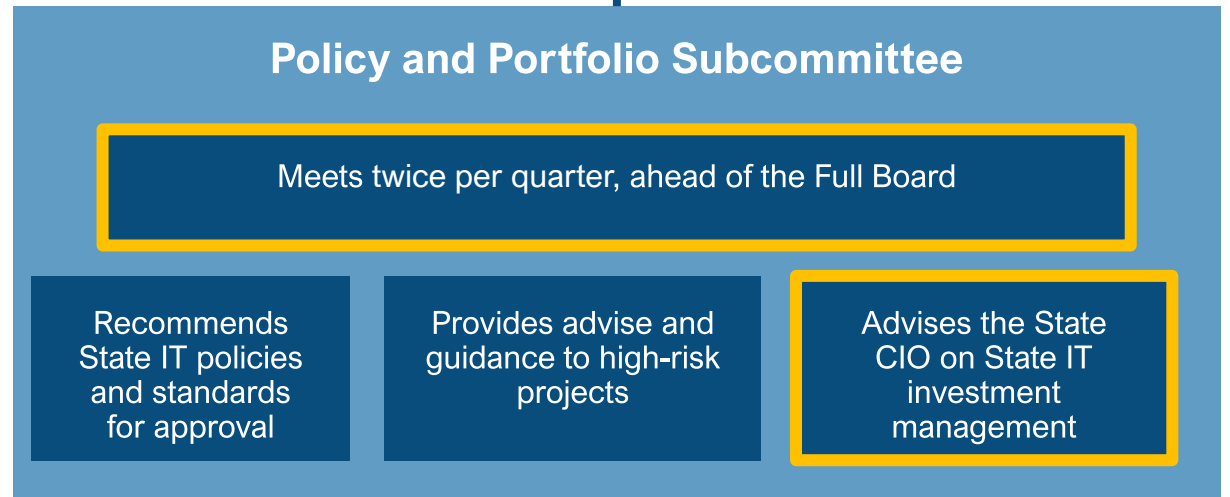
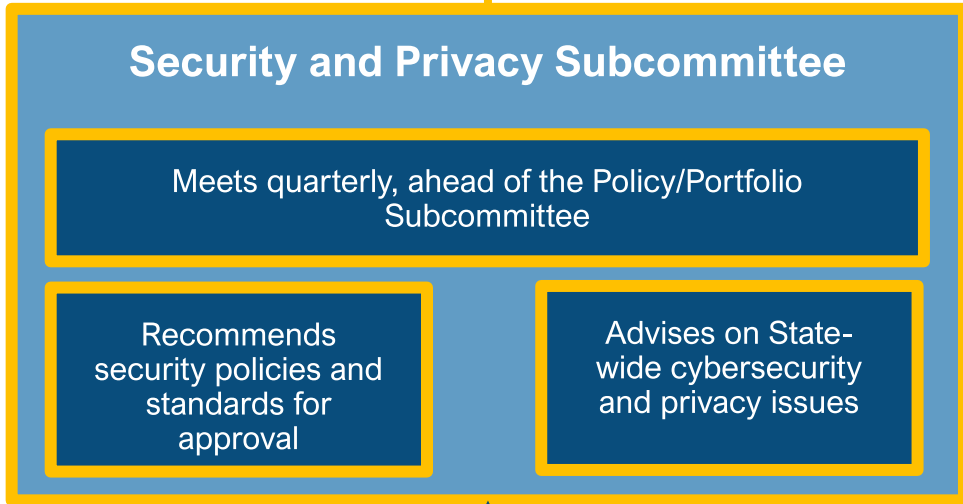
Subcommittee Structure

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New proposal

← Reports to

← - - - - -
Informs



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Public Comment

