

EDMS

Environmental Data Management System

Kerri Nelson & Clint Bollinger



Why

- Agency has multiple, aging (> 10 years old) electronic systems for managing data;
- Business processes are not consistent among programs or well documented;
- Data exchanges with stakeholders is difficult
- E-commerce



What do we need a system to do?

Give us a common platform and uniform business processes

- Entity management
- Permit tracking/issuance
- Inspections
- Reporting
- Invoicing
- E-payments
- Additional functionality based on stakeholder outreach and in-depth business analysis



Process

Stage Gate 1-4, consisting of the following key milestones

- Business Case and subsequent refinements
- Business analysis
- RFI
- RFP
- Vendor selection
- Implementation



Stage Gate 1 Details

Stage Gate 1 (Concept Phase): typically performed during the budgeting process and ends with Stage Endorsement 1 by Oregon State CIO (OSCIO)

- Artifacts that support this Stage Gate are expected to be high level. Includes a business case and Internal Rate of Return (IRR)
- From the perspective of a project's authorized budget, the goal in Stage 1 is to secure funding for the preparation of a detailed Business Case and to perform project planning.



Stage Gate 2 Details

Stage Gate 2 (Initiation Phase): performed during preparation of a detailed Business Case / IRR and ends with Stage Endorsement 2 by OSCIO

- The goal in Stage 2 is State CIO approval of a project's preferred solution approach (part of the project's business case), requirements that can support a formal RFP, and a "+/- 50% plan" with respect to scope, schedule, budget, resources, and quality.
- Expected to occur substantially before the release of a formal Request for Proposals (RFP) process to procure the project's Prime Contractor.
- Prior to Stage 2 Endorsement, the agency should assign or obtain project management resources and obtain independent Quality Assurance.
- Independent Quality Control review of important foundational planning artifacts needs to occur before Stage 2 Endorsement; including review of the Requirements and Statement of Work that support the RFP process to procure the project's Prime Contractor.
- From the perspective of a project's authorized budget, the goal in Stage 2 is to secure funding for Detailed Planning.



Stage Gate 3 Details

Stage Gate 3 (Planning Phase): performed during preparation of a project's Detailed Plan and ends with Stage Endorsement 3 from OSCIO.

- Period when a project has substantial details about the specific implementation approach to be adopted; usually just prior to or around the release of the RFP(s) for the Prime Contractor.
- During this period, a re-baseline of the Project's plan to achieve a "+/- 10% plan" and an IRR Update (to be approved by the State CIO) are expected.
- The Detailed Plan is expected to be updated once the Prime Contractor has been procured and, as appropriate, throughout the project lifecycle.
- Agencies and their contractors may not begin Stage 4 work before receiving Stage Endorsement 3.
- From the perspective of a project's authorized budget, the goal in Stage 3 is to secure funding for Execution.



Stage Gate 4 Details

Stage Gate 4 (Execution Phase): covers a project's main implementation work and ends with Stage Endorsement 4 from OSCIO.

- Status Reviews depend on the specific software development lifecycle adopted by a project; and the size, complexity, and risk of the project.
- During this period and for projects with an Independent QA contractor, OSCIO expects: a. Independent Quality Management Services that cover quality planning, quality control (QC) reviews of important project work products and IV&V testing, quality assurance, and risk assessment; b. the scope of independent quality control (QC).



Current Status

- Stage Gate 1
- Draft Business Case was out for internal review until July 8th 2016, and results are being compiled
- Plan to seek EQC input
- Approval to sell bonds to fund EDMS secured through the State Treasury
- Policy Option Package developed to support EDMS. Requesting General Fund to pay for Debt Service on the bonds.



Outreach

- DEQ staff
- EQC
- Stakeholders
- State CIO & STO
- Legislative Fiscal Office
- DAS Budget shop



Governance

- Executive Steering team – would like to include an EQC member
- Technical Support team – staff and managers who will help guide/support the project



Policy Option Package

- \$17M in funding to pay for licensing, staff, quality assurance, change management and staff time
- Requesting 22 staff, mainly LD
- Recognize that this will be a minimum of a 6 year project

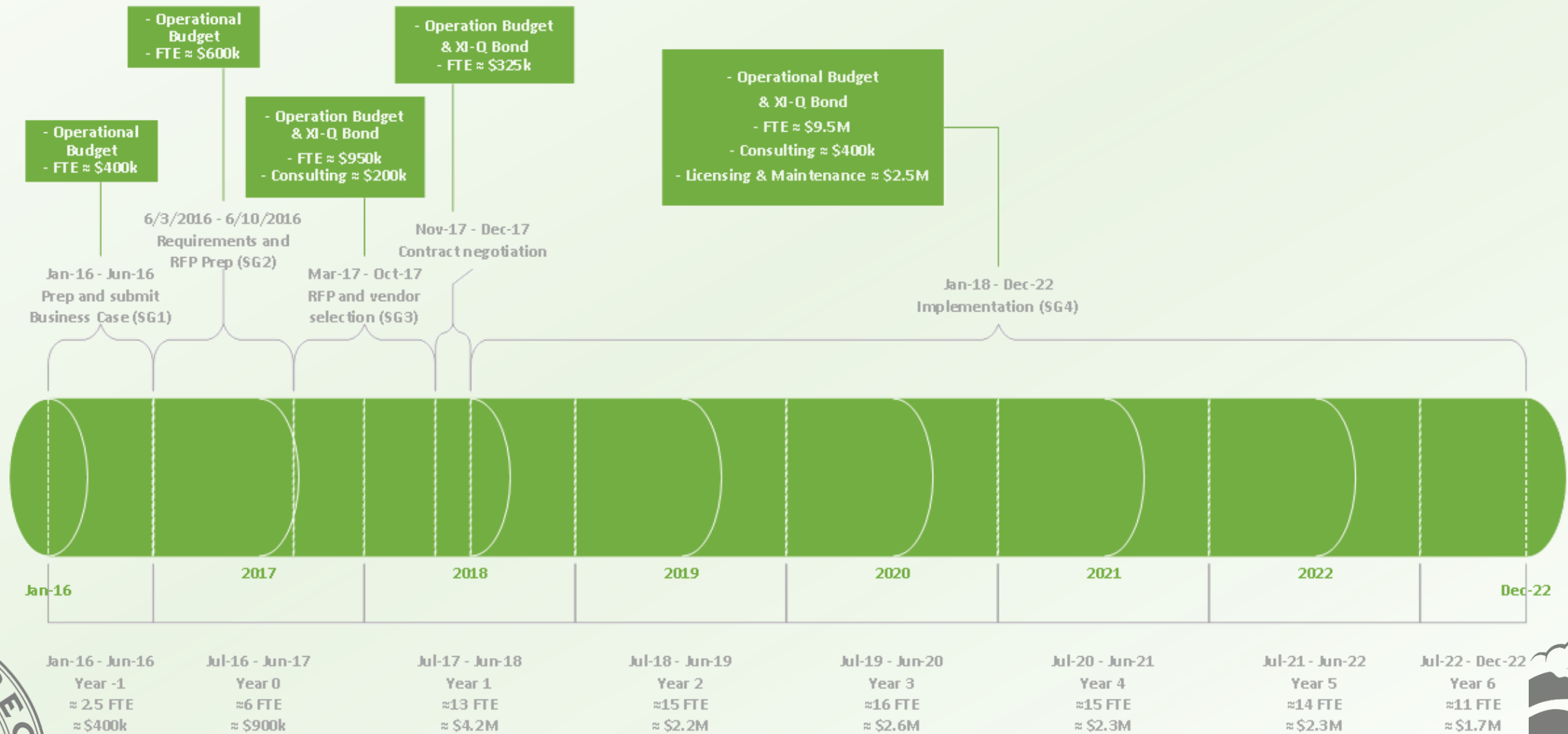


Next Steps

- Hire a project manager
- Complete Central Entity Management tasks
- Conduct business analysis of our programmatic areas
- Focused internal and external stakeholder outreach
- Institute a governance structure
- Continue to support the legislative process
- Onboarding QA vendor
- Gain Stage Gate 1 approval



Timeline



QUESTIONS?

