

Testimony Legislative IT Committee October 9, 2012

Darin Schorsch

OMB Human Resource Management Services

Good afternoon, Chairman Weisz and members of the Legislative IT Committee. I am Darin Schorsch, Business Analyst and Functional Lead of PeopleSoft Modules for Human Resource Management Services, a division of the Office of Management and Budget.

Project Description

The TM project provides State employees and managers with online profile, performance appraisal, career planning, and strategic succession planning capabilities. Additionally, it provides an online capability for managers to initiate HR actions on behalf of their direct reports.

The State of North Dakota utilized purchased TM licenses and the existing Portal, Human Capital Management (HCM) PeopleSoft production applications.

Objectives

The project had 7 key measures, of which 5 have been met at this time. The 2 remaining are longer term measures.

Schedule/Budget Objectives (pg2)

Project start date was September 6, 2011 and finished on time, with a "Go Live" date of May 11, 2012. The project used OMB ConnectND funding and finished under budget 11.35%, with budgeted cost \$745,336 and actual costs of \$660,735.

Major Scope Changes – none

Lessons Learned were captured from a survey of project team members, and range from ideas on staff scheduling, communication, training and system access.

Our Success Stories were gathered while working with agencies on creating meaningful online performance documents.

Mr. Chairman, thank you for your time this afternoon and I will stand for any questions.

Project Closeout Report

Presented to the IT Committee October 9, 2012

Project Name: OMB PeopleSoft Talent Management

Agency: OMB

Business Unit/Program Area: HRMS

Project Sponsor: Laurie Hammeren

Project Manager: Darin Anderson

Objectives		
Project Objectives	Measurements	
	Met/ Not Met	Description
<u>Objective 1.1:</u> ePerformance Planning – enable agencies to directly link employee performance and rewards with the organizations financial and business needs.	Met	<u>Measurement 1.1.1:</u> Once the module is implemented, agencies will have a comprehensive online employee performance system. This system will allow employee and manager self-service.
	Met	<u>Measurement 1.1.2:</u> Within <u>6 months</u> of implementation, agencies committed during the planning phase, will have processes in place to prepare for the use of this functionality during the next evaluation cycle.
<u>Objective 1.2:</u> eDevelopment/Career Planning - enable employees to create, modify and view personal profiles reflecting their capabilities and accomplishments.	Met	<u>Measurement 1.2.1:</u> Once the module is implemented, agencies will have the ability to access career profiles, career plans and ability to add alternative plans.
	Not Met*	<u>Measurement 1.2.2:</u> Within <u>3 months</u> of implementation, agencies committed during the planning phase, will utilize this functionality for all standard career paths and 10% of staff will review their career path with a supervisor. *Currently we are at 1%, but continue work with agencies to increase the use of career planning.
<u>Objective 1.3:</u> eSuccession Planning - ensure that the next generation of managers has access to the right knowledge to continue doing business without a drop-off in performance.	Met	<u>Measurement 1.3.1:</u> Once the module is implemented, agencies will have the ability to designate key positions, identify key position requirements including minimum qualifications.
<u>Objective 2.1:</u> Successfully implement Talent Management functionality to include ePerformance, eDevelopment/Career Planning, eSuccession, and a competency library to be used by participating agencies.	Met	<u>Measurement 2.1.1:</u> All functionality identified in the scope of the Talent Management charter is deployed and available for use. Measurement will be taken <u>3 months</u> after product deployment.
	Not Met*	<u>Measurement 2.1.2:</u> Surveyed employees, managers, and supervisors of participating agencies will rank the training and support they received as 3 or higher on a Likert Scale of 1-5 in relation to their preparedness to successfully utilize the new functionality. Measurement will be taken within <u>3 months</u> of production deployment *The survey for the targeted group of users has been made a longer term measure – one of our lessons learned.

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Schedule Objectives

Met/ Not Met	Original Baseline Schedule (in Months)	Final Baseline Schedule (in Months)	Actual Schedule (in Months)	Variance to Original Baseline	Variance to Final Baseline
Met	7.5	7.5	7.5	0	0

Budget Objectives

Met/ Not Met	Original Baseline Budget	Final Baseline Budget	Actual Costs	Variance to Original Baseline	Variance to Final Baseline
Met	\$745,336	\$745,336	\$660,735	11.35% Under	11.35% Under

Major Scope Changes

None

Lessons Learned

<ol style="list-style-type: none"> 1. In future projects, be sure to cover vacation schedules to ensure key staff is available when needed. 2. With future projects create a central repository to track questions/concerns/to-dos while working with agencies throughout the project. 3. There was too much reliance on UPK for training. 4. No matter how you test and prepare in a test environment, production just acts differently. I.E. the verity search for results writer was hitting only 1 server, when we load balance the content was not on any of the other servers...resulting in no content found. But the data center fixed in less than a week. 5. Communication from directors/supervisors to staff needs to happen prior to performance documents being created so that staff be aware of what is going to happen and what is expected of them. Some staff didn't know what the PeopleSoft email was for and it was deleted. Also, part of this issue was the email wasn't descriptive enough so we have changed that. 6. Going directly in to environments, next time we should use portal to access the system. This will be the way the user uses the system. 7. Target audience was executives and managers, however the HR folks were the ones involved in the meetings. In the future, up the focus to executives and managers. This would improve communications from the HR folks down to the supervisors and team leaders. 8. Be sure to evaluate resourcing early on in the project. 9. Expand the UAT to users that do not use the system – this could happen early with the vanilla version and later with UAT. 10. Create a user experience bucket of time/budget (10-15%) to enhance the user experience to ensure the business unit is happy with the end result. 11. Find a better mix for training via UPK and hands on exercises. 12. Part of the closing survey, a survey geared towards the agency leads/SME's.

Success Stories

<ol style="list-style-type: none"> 1. Provided agencies with a way to tie organizational objectives with personal goals. 2. Universal online performance application. 3. Like the ability to see the history of ratings within the system. 4. Easy to change templates once they know what they look like. 5. Brings over the ELM transcript. 6. Able to use the system for policies. 7. Emails the users when something needs to be completed. 8. Supervisors can send it to the employee for review prior to approval. 9. Employee and manager can be on the same page on what the employee will be rated on in one years' time. 10. The ability to use exit interviews. 11. Able to see different careers with the state. 12. Agencies like the ability to view combined performance notes.
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