

City of Boise



IT Organization Transition Plan

May 16, 2006

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Mr. Garry Beaty
Chief Information Officer
City of Boise
150 North Capitol Blvd.
Boise, Idaho 83701

Dear Garry:

PTI is pleased to present the final Information Technology Organization Transition Plan to the City of Boise. This report documents the analysis, findings, and recommendations from our work conducted from January through April of this year.

Please call me at (425) 881-3991 with any questions or concerns.

Thanks and best wishes,

Michael Silverman

Mike Silverman
Co-Chief Executive Officer

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City of Boise

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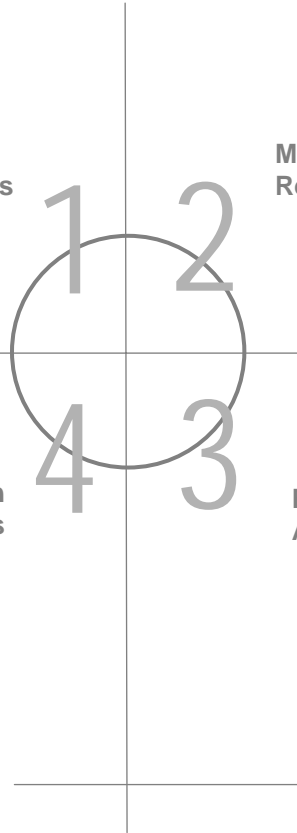
- A. First Year Project Plans
- B. Suggest Performance Targets

Key Findings

Major
Recommendations

Risks and Mitigation
Strategies

Recommended
Action Plan



Executive Overview

INTRODUCTION

In June of 2005, the City of Boise (the City) engaged Pacific Technologies, Inc. (PTI) to develop its city-wide Information Technology (IT) Strategic Plan. This document, which was accepted by the City in November 2005, recommends significant changes to Boise’s approach to IT service delivery. These changes include centralizing all service delivery related to server, network, and workstation support within the Information & Technology (I&T) Department, while allowing the business units to retain application support staff, if they so choose. The benefits of centralizing IT include:

- ◆ **Improved IT service delivery via increased specialization of technical staff**
- ◆ **Enhanced management of the technical architecture**
- ◆ **Economies of scale in IT labor and infrastructure**
- ◆ **Clarity of departmental versus centralized technology support roles**

Recognizing that restructuring IT service delivery at the City will be difficult, the City’s Chief Information Officer (CIO) asked PTI to develop an IT organization transition plan in December 2005. Overall, the aim of this work is to help smooth implementation of the City’s new IT service delivery model and position the City to successfully attain the goal state articulated in the IT Strategic Plan.

PTI supported the effort through 16 one-on-one interviews with selected stakeholders from across the City, including representatives from impacted

departments and other members of Boise’s executive team. The interviews focused on service delivery expectations, potential performance measures and targets, and transition risks and mitigation strategies.

The remainder of this chapter summarizes our recommended transition plan, as follows:

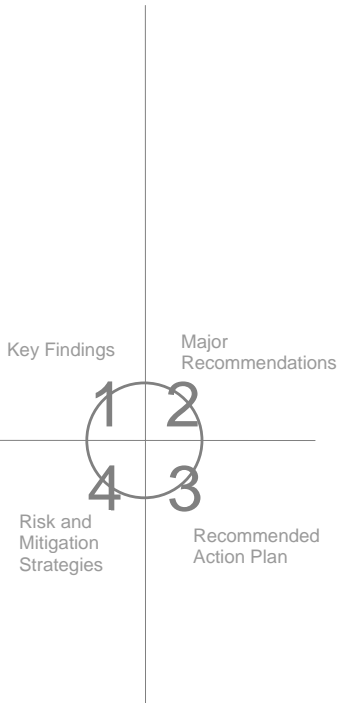
1. Key Findings
2. Major Recommendations
3. Recommended Action Plan
4. Risks and Mitigation Strategies

In addition, the scope of this plan includes a review and expanded description of first year projects defined in the IT plan (see Appendix A).

1. KEY FINDINGS

This section presents PTI’s findings and associated impacts. We derived them from our one-on-one interviews and by leveraging data from the IT Strategic Plan. These findings guided the development of the recommendations and the action plan. Key findings include:

- ◆ **While some departments support centralization – most with internal IT support staff are resistant to change.** Key business-unit questions include:
 - How will priorities be set?
 - How quickly will problems be resolved?
 - Who will provide after hours support and security?
 - Will critical IT staff be taken away?
 - Will this cost me more money?



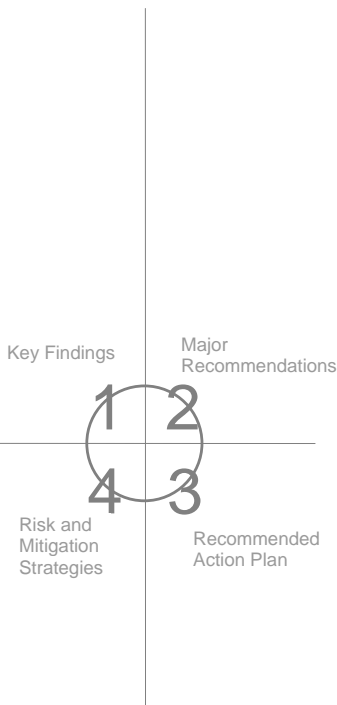
- ◆ **Major concerns surround credibility and trust:**
 - Some departments are reluctant to make the transition because of poor prior experience with centralization
 - Many do not perceive I&T to be an effective service provider today
- ◆ **Currently, no IT performance measures or baseline service levels exist** – making quantitative evaluation of either departmental or I&T performance impossible
- ◆ **As indicated in the IT Strategic Plan, Boise’s I&T help desk faces the following issues:**
 - No formal help desk tools exist
 - No standard IT operating policies, practices or procedures are in place
 - Not professionally-managed – although I&T is pursuing the ITIL service management framework
- ◆ **Infrastructure consolidation and standardization is critical to the success of the project** – if this does not occur, the City will sacrifice its ability to fully achieve projected labor economies of scale

2. MAJOR RECOMMENDATIONS

This section summarizes recommendations intended to ease the transition to centralized IT services while maintaining sufficient business continuity. It also presents our recommendations for moving business unit IT staff into the I&T Department.

- ◆ **Obtain clear endorsement from the Mayor and City Council** – this will help ensure department and division management support.

- ◆ **Change reporting relationships in one step** – avoiding a staged transition if possible. This maintains IT service delivery levels and shortens transition time, helping minimize staff anxiety surrounding the change.
- ◆ **Develop a well thought-out and executed change management plan** – communicating the benefits of centralization and addressing business continuity needs across the organization.
- ◆ **Charter a transition management team** – consisting of representatives from the business units, IT, HR, finance, and legal, leveraging expertise in the operating logistics of centralizing IT services.
- ◆ **Develop formalized service level metrics** – and develop corresponding service level agreements. This ensures IT accountability and service delivery measurement.
- ◆ **Regarding IT staff physical consolidation:**
 - Consolidate infrastructure service delivery in concert with optimizing infrastructure
 - Consolidate help desk service delivery once the infrastructure changes are complete
 - Have extra help desk staff available for the first two months after the transition to stabilize service
- ◆ **Address help desk issues by:**
 - Centralizing staff
 - Procuring and implementing a help desk incident management package
 - Adopting and training IT staff in a service management framework (e.g. ITIL)
- ◆ **Revise and simplify the IT funding model**



- ◆ *Make certain the new IT governance model incorporates sufficient input from the departments*
- ◆ *Conduct a readiness assessment before execution as part of the change management effort* – make sure all aspects of the enterprise are prepared for centralization:
 - Help desk is ready
 - Users know who to call and understand escalation procedures
 - Operating standards and policies are in place
 - Communication plan is implemented

IT Staff Moves

PTI leveraged the staffing analysis from the IT Strategic Plan to determine the recommended approach to centralizing IT staff. We based our IT staffing recommendations on:

- ◆ IT staff labor allocation as reported in the IT Strategic Plan; our labor analysis indicated that approximately half of the business unit IT effort was devoted to “commodity” services (i.e., activities that support baseline technologies such as network connectivity, workstation and server administration, etc.) that are best centralized to provide improved economies of scale and service levels
- ◆ Interviews with IT and business unit management
- ◆ PTI’s professional experience and industry “best practices”

The following table on the right presents a summary of the current IT staffing, the number of positions to move into I&T and the remaining positions within the business units.

Department	Current Department IT Positions	Number of Positions to Move	Remaining Department IT
Library	4	2	2
PDS	4	2	2
Police*	4	2	2
PWD	11	8	3
Total	23	14	9

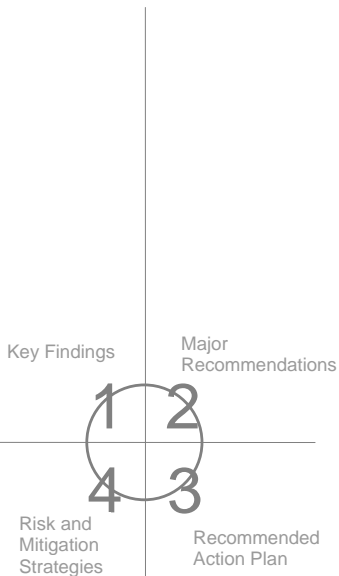
I&T	Current I&T Positions	Positions from Departments	Total I&T Positions
Total	31	14	45

* Two of the noted positions are half-time (0.5 FTEs)

In summary, 23 IT staff are embedded in the City’s business units. Based on our labor analysis, we recommend moving 14 of these staff into I&T. The remaining 9 are left in the business units to provide application support. This brings I&T to the recommended “end-state” staffing level of 45.

Reallocation of this kind has successfully improved service and saved money in a variety of public sector organizations, including Snohomish County, Washington, and the State of North Dakota, among others. Consistent with best practices, organizations that centralize “back-end” technology services realize economies of scale in labor and hardware, experience more consistent and secure infrastructure support, and yield “hard dollar” cost savings.

Please see Chapter 3 for additional detail.



**IT ORGANIZATION
 TRANSITION PLAN**

Chapter 1:
 Executive Overview

3. RECOMMENDED ACTION PLAN

This section presents the recommended action plan and associated project schedule. The table below presents brief descriptions of each task within the plan. See chapter 2 for further detail. Significant milestones include:

- ◆ Developing and executing a communication plan and change management process, starting in May 2006
- ◆ Chartering a management team with broad representation to facilitate the transition, starting in August 2006
- ◆ Training IT staff, consolidating infrastructure, developing standards and policies and other preparations from May to September 2006
- ◆ Deploying IT staff transitions, timed to the new fiscal year – beginning October 1, 2006

TASK	DESCRIPTION
1. Finalize and communicate CIO job description	Revise the CIO job description to increase authority over city-wide IT and centralize responsibility for IT
2. Develop and execute communication plan	Create an effective communication plan that involves all stakeholders and addresses risks and mitigation plans
3. Define change management process	Utilize a change management consultant or internal HR professional to smooth the transition process
4. Charter project team	Create a transition team consisting of key managers from IT, HR, Finance, and Legal
5. Develop operations standards and policies	Develop a set of standards and policies around IT security, privacy, computer use and service delivery
6. Implement infrastructure consolidation	Implement the technical infrastructure projects, consolidating servers and data centers
7. Train customer service staff in ITIL practices	Utilize the ITIL service management module to infuse best practices in the delivery of IT services
8. Procure and implement Help Desk tool	Define requirements, develop RFP, and initiate procurement process for enterprise help desk tool
9. Revise reporting relationships	Change reporting relationships for transitioned staff from business units to report to the CIO
10. Implement desktop standards	Define requirements, develop standards and roll-out plan, procure software and implement standards
11. Begin performance measurement	Establish service level objectives and track service level metrics
12. Perform customer service training	Train customer service group with formalized methods and techniques
13. Perform skills assessment	Measure transitioned staffs' knowledge, skills, and abilities
14. Develop staff space plan	Develop IT staff space plan, consolidating offices in central IT and second site in City Hall
15. Conduct performance reviews	Conduct a series of transitioned-staff performance reviews, 3 months after transition period
16. Perform post-implementation review/presentation	Conduct post-implementation analysis, review, and de-briefing to key stakeholders



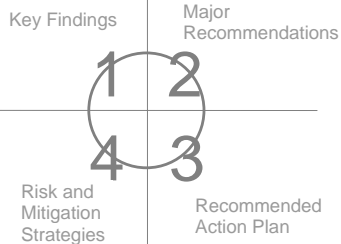
Recommended Task Schedule

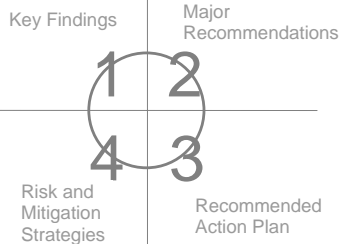
The Gantt chart below displays the recommended timeline for the transition plan. The City may need to periodically make appropriate adjustments to the schedule based on progress and business priorities.

IT ORGANIZATION TRANSITION PLAN

Chapter 1: Executive Overview

Task Name	Qtr 2, 2006			Qtr 3, 2006			Qtr 4, 2006			Qtr 1, 2007			Qtr 2, 2007			Qtr 3, 2007			Qtr 4, 2007			Qtr 1, 2008		
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1. Finalize and communicate CIO job description	■																							
2. Develop and execute communication plan		■	■	■																				
3. Define change management process				■	■	■																		
4. Charter project team					■	■	■	■																
5. Develop operations standards and policies	■	■	■	■	■	■																		
6. Implement infrastructure consolidation	■	■	■	■	■	■	■	■	■															
7. Train customer service staff in ITIL practices						■	■																	
8. Procure and implement Help Desk tool				■	■	■	■																	
9. Revise reporting relationships							■	■																
10. Implement desktop standards	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
11. Begin performance measurement							■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
12. Perform customer service training							■	■	■	■														
13. Conduct skills assessment																	■	■	■	■	■			
14. Develop staff space plan																■	■							
15. Conduct performance reviews							■	■	■															
16. Perform post-implementation review/presentation																						■	■	■





4. RISKS AND MITIGATION STRATEGIES

All transitions are risky in nature. The history of failed centralization efforts at Boise continues to fuel perceptions of low quality service. This section presents the main risks the City will likely face and mitigation strategies to address them.

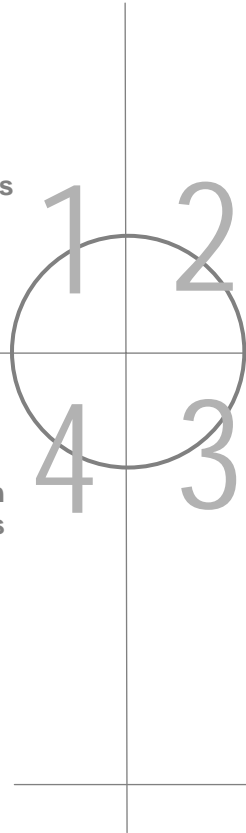
Risks	Mitigation Strategy
1. Significant organizational (departments) resistance to the transition.	Explicitly get senior management endorsement for the effort, effectively communicate benefits of centralization to those affected, involve stakeholders in the transition process, address negative service impacts to departments, and develop formal service level agreements.
2. Individual staff members may be resistant to the transition due to uncertainty or threats to their current roles and responsibilities.	Provide adequate training and time for individuals to adjust, set clear expectations and timed goals and outcomes, conduct skills assessment and repurpose accordingly, clearly define roles and responsibilities, and identify skill gaps.
3. Service levels may fall during transition phase and after completion of the transition.	Communicate impacts on service levels during and after the transition, set realistic expectations, allow time for the enterprise to realize efficiency improvements, consider temporary utilization of contractors to augment labor.
4. I&T may not receive adequate funding for a successful transition. Also, the funding model may cause budget inequities to the departments.	Perform due diligence with finance and City Council to ensure adequate funding is dedicated for a successful transition, address inequity problems if they exist.
5. May not be able to redeploy/repurpose present staff into new roles and/or functions.	May need to temporarily supplement with outside staff, repurposing existing staff to other City functions, and train staff in new functions. Over time, may need to eliminate some existing positions.
6. Centralization may not achieve projected cost savings and service benefits. Correspondingly, it may be difficult to prove success if the City is unable or unwilling to measure baseline performance measures.	Dedicate sufficient time for increase in realized efficiency, measure baseline service levels using the ITIL framework, dedicate sufficient time to realize efficiency gains.
7. Some departments may be unsatisfied with break/fix prioritization after centralization. Service levels will differ from the status quo.	Address changes to departments affected, use service level agreements to meet minimum expected levels of service, develop prioritization schedule and communicate it properly with stakeholder.
8. Operationally, the City may not have sufficient space for staff moving to I&T. May not be able to consolidate data center due to space or network capacity limitations.	Develop alternate plans if contiguous space is not available (e.g., staff stays in departments but reports to I&T), leverage Airport data center.

Key Findings

Major
Recommendations

Risks and Mitigation
Strategies

Recommended
Action Plan



IT Organization Transition Strategy

IT Organization Transition Strategy Overview

CHAPTER

2

This chapter presents a transition strategy for centralizing IT services at the City of Boise. This work builds on the IT “roadmap” outlined in the *City of Boise IT Strategic Plan*, providing additional guidance on enhancing IT service and realizing economies of scale.

This chapter includes:

- ◆ Key Findings
- ◆ Major Recommendations
- ◆ Recommended Action Plan
- ◆ Risks and Mitigation Strategies



Key Findings Overview

CHAPTER 2

This section presents PTI's key findings and associated impacts related to the IT organization transition.

To inform our analysis, we leveraged data collected from the IT Strategic Plan and validated our findings with key managers and executives at the City through 16 one-on-one interviews.

We employed these findings to guide the development of the recommendations and the action plan presented later in this chapter.



Key Findings

CHAPTER

2

The following presents PTI's key findings and associated impacts related to the IT organization transition.

Finding	Impact
<p>While some departments support centralization – most with internal IT support staff are resistant to change. Key business unit questions include:</p> <ul style="list-style-type: none"> ◆ How will priorities will be set? ◆ How quickly will problems be resolved? ◆ Who will provide after hours support and security? ◆ Will critical IT staff be taken away? ◆ Will this cost me more money? 	<p><i>Strong resistance to centralization impedes progress. Unless addressed head-on, business units will continue to embrace the status quo and thwart centralization efforts.</i></p>
<p>Major concerns surround credibility and trust:</p> <ul style="list-style-type: none"> ◆ Some departments are reluctant to make the transition because of poor prior experience with centralization ◆ Many do not perceive I&T to be an effective service provider today 	<p><i>Prior experience with central IT performance, colors perceptions of future capabilities and fuels resistance to change.</i></p>
<p>Currently, no IT performance measures or baseline service levels exist – making quantitative evaluation of either departmental or I&T performance impossible</p>	<p><i>It is difficult, if not impossible, to gauge baseline performance levels at I&T or in the departments. Accordingly, mechanisms are not in place to enable objective comparisons of current-to-projected IT service levels.</i></p>

Key Findings (continued)

Finding	Impact
<p>As indicated in the IT Strategic Plan, Boise’s I&T help desk faces the following issues:</p> <ul style="list-style-type: none"> ◆ No formal help desk tools exist ◆ No standard IT operating policies, practices or procedures are in place ◆ Not professionally-managed – although IT is pursuing the ITIL service management framework 	<p><i>Current help desk tools, practices and management cannot provide high-level service demanded by business units after centralization.</i></p>
<p>Infrastructure consolidation is critical to the success of the project</p>	<p><i>If consolidation does not occur, the City will sacrifice its ability to fully achieve projected labor economies of scale.</i></p>
<p>Most departments express interest in establishing a transition management team.</p>	<p><i>Transition may require charting a cross-functional team. May lead to additional bureaucracy.</i></p>

Key Findings (continued)

Finding	Impact
<p>The existing central IT office space has no room for expansion. I&T is pursuing the possibility of sharing space within one of the business units.</p>	<p><i>Limited office space may cause IT employee morale problems during transition. To the extent that facilities expenses are charged to the business units, it may also complicate revisions to the funding model.</i></p>
<p>Concerns surround the future IT funding model:</p> <ul style="list-style-type: none"> ◆ Will it create budget inequities across departments? ◆ Will chargebacks be commensurate with IT services provided? 	<p><i>Potential for inequity in funding during the first year of transition. In a worst-case scenario, general fund departments' budgets would increase, while enterprise fund departments would pay less, resulting in a general fund deficit.</i></p>

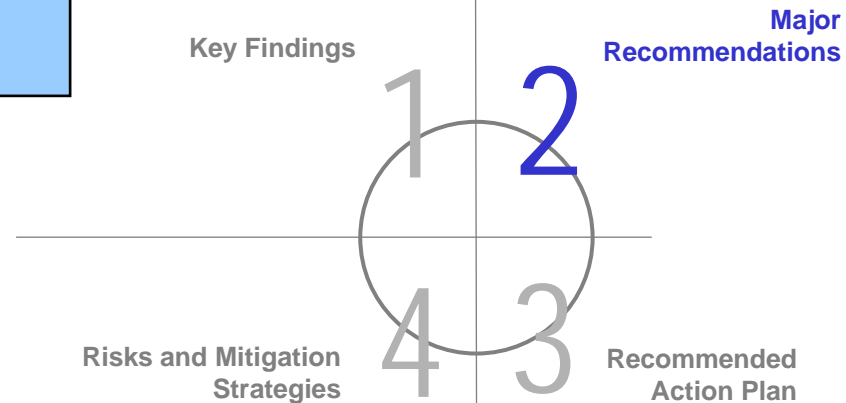
Major Recommendations Overview

CHAPTER 2

This section outlines PTI's major recommendations and attendant benefits.

The recommendations presented in this section articulate a core set of directives for addressing identified findings and transitioning the City to a more efficient and effective IT service delivery model.

The subsequent chapter translates these recommendations into a costed, calendared action plan.



Major Recommendations

The following presents major recommendations and attendant benefits.

Recommendation	Benefit
<p>Obtain clear endorsement from the Mayor and City Council.</p>	<p><i>Provides clear indication of enterprise-wide adoption and support for IT centralization including management support and staff buy-in.</i></p>
<p>Change reporting relationships in one step – avoiding a staged transition if possible.</p>	<p><i>Maintains business continuity, expedites transition time and minimizes opportunities for some departments to opt out of the IT reorganization.</i></p>
<p>Develop and execute a cogent communication plan – addressing stakeholder concerns and feedback requirements across the organization.</p>	<p><i>Effectively communicates benefits of centralization, builds consensus, proactively addresses issues, helps manage expectations, and clearly defines roles and responsibilities.</i></p>

Major Recommendations

(continued)

CHAPTER

2

Recommendation	Benefit
<p>Charter a transition management team – consisting of IT, HR, Finance, and Legal representation, leveraging expertise in the operating logistics of centralizing IT services.</p>	<p><i>Empowers a core group of individuals with requisite subject matter expertise to address some of the difficult tactical issues that may arise during the transition.</i></p>
<p>Develop formalized service level metrics – and corresponding service level agreements.</p>	<p><i>Enhances IT accountability, allowing IT to more effectively measure, monitor and manage IT service delivery.</i></p>
<p>Regarding IT staffing:</p> <ul style="list-style-type: none"> ◆ Consolidate help desk service delivery first ◆ Consolidate infrastructure service delivery in concert with optimizing infrastructure, preferably over several weekends 	<p><i>Maintains business continuity, improves quality of help desk service delivery, and reduces infrastructure downtime.</i></p>
<p>Address help desk issues by:</p> <ul style="list-style-type: none"> ◆ Centralizing staff with Tier-1 and Tier-2 support responsibilities ◆ Procuring and implementing a help desk package ◆ Adopting a service management framework (e.g., ITIL) 	<p><i>Achieves technical support economies of scale and clear escalation paths, develops a professionally-managed and consistent quality support desk, and reduces cost per incident.</i></p>
<p>Note: Tier-1 support – activities related to first point of contact for users to report problems and seek answers to questions related to PCs, network access, email, etc. Includes initial problem resolution, triage and problem escalation. Tier-2 support – activities related to providing in-person assistance for software and hardware that support user work functions, including PCs, handhelds, peripherals and specialized computing environments such as public kiosks.</p>	

Major Recommendations

(continued)

CHAPTER

2

Recommendation	Benefit
<p>Revise and simplify the IT funding model (i.e., charge back model).</p>	<p><i>Promotes equity, clarity and trust between IT services delivered and the chargeback cost of those services to the departments.</i></p>
<p>Ensure ongoing and future department business plans and budgets include IT planning component.</p>	<p><i>Supports enterprise IT planning and helps ensure sufficient IT funding.</i></p>
<p>Ensure the IT governance model incorporates sufficient input from the departments.</p>	<p><i>Fosters alignment of IT investments with critical business priorities; supports stakeholder buy-in to IT projects.</i></p>
<p>Conduct a readiness assessment before execution as part of the change management effort – ensuring all aspects of the enterprise are prepared for centralization:</p> <ul style="list-style-type: none"> ◆ Help desk is ready ◆ Users know who to call and understand escalation procedures ◆ Operating standards and policies are in place ◆ Communication plan is implemented 	<p><i>Reduces risk of failure and supports business continuity.</i></p>

Recommended Action Plan Overview

CHAPTER 2

This section presents a recommended action plan with associated task schedules.

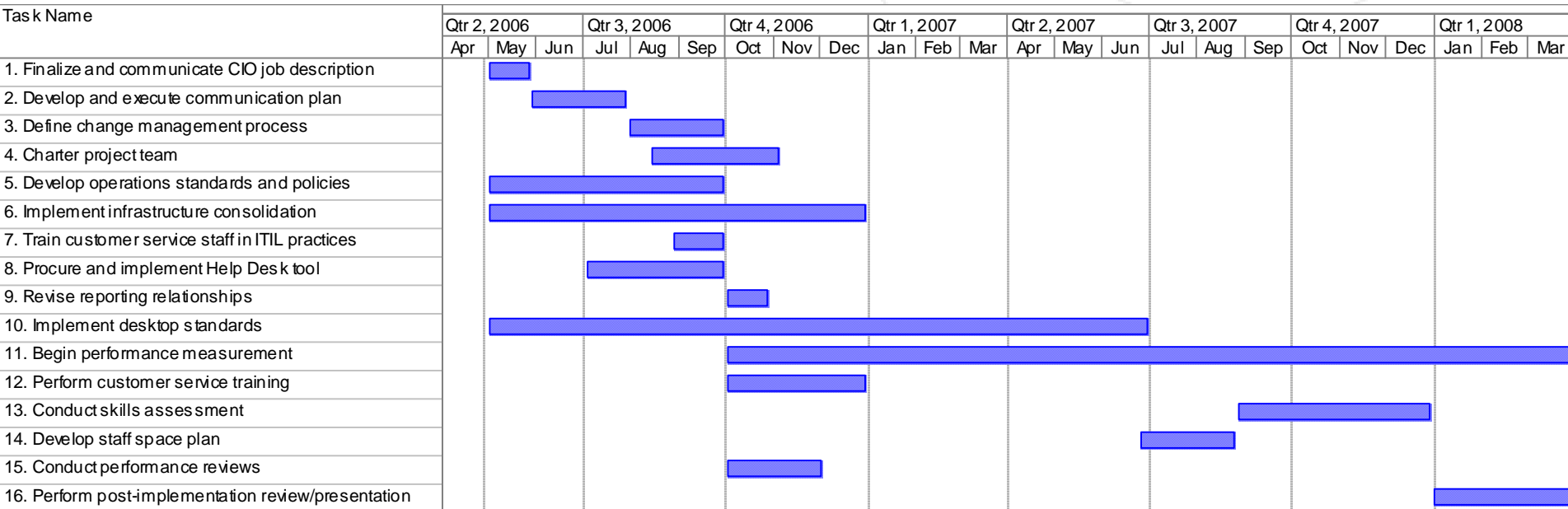
The preceding sections presented PTI's findings and recommendations. This section formalizes those recommendations into a scheduled workplan with associated success measures.



Recommended Action Plan Timeline

CHAPTER 2

The Gantt chart below outlines a specific set of tasks and proposed timelines for the IT organization transition.



Recommended Action Plan

(continued)

CHAPTER

2

The following presents detailed task descriptions with associated benefits and suggested success measures:

TASK 1: Finalize and communicate CIO job description

DESCRIPTION:

Revise the CIO job description to increase authority over city-wide IT and centralize responsibility for IT, as described in the IT Strategic Plan. This task finalizes the job description and communicates it to City staff.

BENEFITS:

Strengthens CIO position and IT organizational leadership, and clearly assigns responsibility for setting IT core standards and IT security.

TASK SUCCESS MEASURES:

- ◆ Updated CIO job description distributed to department heads
- ◆ Associated memo and governance meetings with key stakeholders

TASK 2: Develop and execute communication plan

DESCRIPTION:

Create an effective communication plan that involves all stakeholders and addresses risks and attendant mitigation plans. Also includes outcome expectations and benefits associated with the transition and effectively communicates key points across the enterprise.

BENEFITS:

Fosters staff buy-in, generates excitement and organization-wide support for the plan, improves staff morale, facilitates transition by clarifying roles and responsibilities.

TASK SUCCESS MEASURES:

- ◆ Communication plan developed and distributed city-wide
- ◆ Stakeholders understand benefits of IT centralization (via customer survey)

Recommended Action Plan

(continued)

CHAPTER

2

TASK 3: Define change management process

DESCRIPTION:

Utilize a change management consultant or internal HR professional to smooth the transition process.

BENEFITS:

Addresses personnel issues during and after transition, resolves staffing conflicts, smoothes the transition process.

TASK SUCCESS MEASURES:

- ◆ Customer satisfaction surveys
- ◆ Retention rate of high-performance IT employees

TASK 4: Charter project team

DESCRIPTION:

Create a transition team consisting of key managers from IT, HR, Finance, and Legal. The team will assist in the transition, bringing all areas of expertise necessary to effectively transition the City to centralized IT services.

BENEFITS:

Leverages subject matter experts, smoothes the transition, supports business continuity.

TASK SUCCESS MEASURES:

- ◆ Project team in place and productive
- ◆ IT maintains or improves service delivery to the business units as measured by ITIL service level metrics (Tasks 7 & 11)

Recommended Action Plan

(continued)

CHAPTER

2

TASK 5: Develop operations standards and policies

DESCRIPTION:

Develops a set of standards and policies around IT security, privacy, computer use, and formal documentation of standards and policies regarding customer communications and department operations.

BENEFITS:

Documents IT standards and policies, improved day-to-day operations and associated controls, improved ability to track IT effort and outcomes.

TASK SUCCESS MEASURES:

- ◆ Standards and policies documented and implemented
- ◆ IT compliance rate for standards and policies

TASK 6: Implement infrastructure consolidation

DESCRIPTION:

Implements the technical infrastructure projects from the IT strategic plan, specifically consolidating servers and data centers. Initiates space planning for infrastructure and staffing.

BENEFITS:

Reduces support costs, achieves network and server management economies of scale, safeguards critical corporate server-based information.

TASK SUCCESS MEASURES:

- ◆ Improved server-to-server-support ratio
- ◆ Reduced server and network management support costs
- ◆ Server uptime and security metrics

Recommended Action Plan

(continued)

CHAPTER

2

TASK 7: Train customer service staff in ITIL practices

DESCRIPTION:

Utilize the Information Technology Infrastructure Library (ITIL) service management module to infuse best practices into the delivery of IT services.

BENEFITS:

Formalizes support mechanisms based on industry best practices, increases effectiveness of the help desk, enhances Boise overall capability in IT.

TASK SUCCESS MEASURES:

- ◆ Adoption of service level management standard practices and management procedures
- ◆ Improved workstations to workstation support staff ratio

TASK 8: Procure and implement help desk tool

DESCRIPTION:

Define requirements, develop RFP, and initiate procurement process for enterprise help desk tool. Train staff in formal help desk methodologies and conduct business process re-engineering.

BENEFITS:

Utilizes best practices in service delivery, enhances customer service and satisfaction, provides faster turn-around time and reduced on-site support.

TASK SUCCESS MEASURES:

- ◆ Reduction in cost per incident
- ◆ Improved problem resolution performance
- ◆ Improved customer satisfaction survey outcomes

Recommended Action Plan

(continued)

CHAPTER

2

TASK 9: Revise reporting relationships

DESCRIPTION:

Change reporting relationships for transitioned staff from business units to report to the CIO. Address budgetary issues as needed.

BENEFITS:

Centralizes oversight of IT services, achieves economies of scale, reduces redundant support.

TASK SUCCESS MEASURES:

- ◆ Proportion of services centralized
- ◆ Full transition of staff (i.e., budget follows position, and redundant effort is eliminated)

TASK 10: Implement desktop standards

DESCRIPTION:

Leverage user requirements, develop desktop standards and a roll out strategy. This task also procures and implements a desktop management software package.

BENEFITS:

Centralizes management of desktop systems, achieves economies of scale, increases security.

TASK SUCCESS MEASURES:

- ◆ Desktops are standardized
- ◆ Desktop management tool is in place

Recommended Action Plan

(continued)

CHAPTER

2

TASK 11: Begin performance measurement

DESCRIPTION:

Track ITIL service level metrics – establish baselines, then track weekly metrics for service support and service delivery processes (see Chapter 4).

BENEFITS:

Allows Boise to benchmark its services and measure improvements after centralization, enhances service level metrics, trends services over time for information analytics.

TASK SUCCESS MEASURES:

- ◆ Number of ITIL measures implemented
- ◆ Positive monthly trending for key service delivery metrics

TASK 12: Perform customer service training

DESCRIPTION:

Train IT customer service group with formalized methods and techniques.

BENEFITS:

Enhances core competencies of the help desk, formalizes methodologies used, increase quality and efficiency of help desk.

TASK SUCCESS MEASURES:

- ◆ Problem resolution rate
- ◆ Percent of support staff trained
- ◆ Improved customer satisfaction as measured by surveys

Recommended Action Plan

(continued)

CHAPTER

2

TASK 13: Conduct skills assessment

DESCRIPTION:

Measures transitioned staff knowledge, skills, and abilities. Makes fit determination and re-evaluates position needs as necessary.

BENEFITS:

Ensures adequate staffing for City needs in IT, allows the City to assess its present service delivery position.

TASK SUCCESS MEASURES:

- ◆ Assessment scores exist for each employee
- ◆ Employee development plans exist for employees as necessary

TASK 14: Develop staff space plan

DESCRIPTION:

Develops IT staff office space plan. Since centralized IT space cannot expand, pursue sharing office space with one of the departments.

BENEFITS:

Improves IT staff esprit de corps, information sharing and teamwork.

TASK SUCCESS MEASURES:

- ◆ Move into sufficient IT staff offices
- ◆ End-state I&T employees offices grouped into 2-3 clusters

Recommended Action Plan

(continued)

CHAPTER

2

TASK 15: Conduct performance reviews

DESCRIPTION:

Conducts a series of transitioned-staff performance reviews, 3 months after transition period. Staff are allowed 3 months to adapt to their new role before their performance review.

BENEFITS:

Measures the outcome of the transition, allows the flexibility for I&T to re-evaluate roles and responsibilities, appropriately staffs individuals to their highest and best use.

TASK SUCCESS MEASURES:

- ◆ Performance reviews completed
- ◆ Performance improvement and/or redeployment plans
- ◆ Performance objectives defined for next review cycle

TASK 16: Perform post-implementation review/presentation

DESCRIPTION:

Conduct post-implementation analysis, review, and de-briefing to key stakeholders. This project finalizes and completes the transition, paving way for future service delivery plans.

BENEFITS:

Improves staff morale and enhances credibility of I&T across the City.

TASK SUCCESS MEASURES:

- ◆ Achievement of IT centralization project pre-defined success metrics
- ◆ Customer satisfaction survey responses

Risks and Mitigation Strategies Overview

CHAPTER 2

This section presents the risks and associated mitigation strategies.

All transitions are risky in nature. While not all risk can be eliminated, employing the following strategies will minimize them.



Risks and Mitigation Strategies

The following presents risks and associated mitigation strategies.

Risk	Mitigation Strategy
<p>1. Significant organizational (departments) resistance to the transition.</p>	<p><i>Explicitly get senior management endorsement for the effort, effectively communicate benefits of centralization to those affected, involve stakeholders in the transition process, address negative service impacts to departments, and develop formal service level agreements.</i></p>
<p>2. Individual staff members may be resistant to the transition due to uncertainty or threats to their current roles and responsibilities.</p>	<p><i>Provide adequate training and time for individuals to adjust, set clear expectations and timed goals and outcomes, conduct skills assessment and repurpose accordingly, clearly define roles and responsibilities, and identify skill gaps.</i></p>
<p>3. Service levels may fall during transition phase and after completion of the transition.</p>	<p><i>Communicate impacts on service levels during and after the transition, set realistic expectations, allow time for the enterprise to realize efficiency improvements, consider temporary utilization of contractors to augment labor.</i></p>
<p>4. I&T may not receive adequate funding for a successful transition. Also, the funding model may cause budget inequities to the departments.</p>	<p><i>Perform due diligence with finance and City Council to ensure adequate funding is dedicated for a successful transition, address inequity problems if they exist.</i></p>

Risks and Mitigation Strategies (continued)

Risk	Mitigation Strategy
<p>5. May not be able to redeploy/repurpose present staff into new roles and/or functions.</p>	<p><i>May need to temporarily supplement with outside staff, repurposing existing staff to other City functions, and train staff in new functions. Over time, may need to eliminate some existing positions.</i></p>
<p>6. Centralization may not achieve projected cost savings and service benefits. Correspondingly, it may be difficult to prove success if the City is unable or unwilling to measure baseline performance measures.</p>	<p><i>Dedicate sufficient time for increase in realized efficiency, measure baseline service levels using the ITIL framework, dedicate sufficient time to realize efficiency gains.</i></p>
<p>7. Some departments may be unsatisfied with break/fix prioritization after centralization. Service levels will differ from the status quo.</p>	<p><i>Address changes to departments affected, use service level agreements to meet minimum expected levels of service, develop prioritization schedule and communicate it properly with stakeholder.</i></p>
<p>8. Operationally, the City may not have sufficient space for staff moving to I&T. May not be able to consolidate data center due to space or network capacity limitations.</p>	<p><i>Develop alternate plans if contiguous space is not available (e.g., staff stays in departments but reports to I&T), leverage Airport data center.</i></p>

Key Findings

Major
Recommendations

Risks and Mitigation
Strategies

Recommended
Action Plan

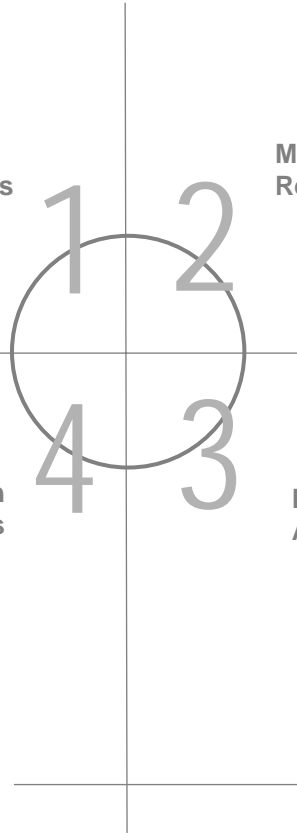
IT Organization Structure & Staffing Levels

Key Findings

Major Recommendations

Risks and Mitigation Strategies

Recommended Action Plan



IT Service Level Management and Measures

IT Service Level Management and Measures Overview

CHAPTER

4

This chapter outlines the following areas:

- ◆ What is Service Level Management?
- ◆ Service Level Management within an ITIL Framework
- ◆ Recommended Boise ITIL Service Level Measures
- ◆ Implementing ITIL with Service Level Agreements

Appendix B contains suggested performance targets for many of the recommended service level measures.

What is Service Level Management? The primary objective of an IT organization is to provide computing services that meet business needs. To achieve this, IT must identify the critical services and delivery levels required by the customers. Service Level Management (SLM) is the process of proactively establishing service commitments, measuring actual performance against those commitments, and providing visibility through management reporting and dashboards. Typically, this is accomplished through Service Level Agreements (SLAs), which can be written agreements developed jointly by IT and its customers.

Service level measures should:

- ◆ Measure service objectively
- ◆ Support customer requirements, including compliance issues
- ◆ Focus on the effectiveness or efficiency of the service provided
- ◆ Apply best practices and/or industry standards

Service Level Management within an ITIL Framework

CHAPTER

4

Information Technology Infrastructure Library (ITIL) provides a service level management framework.

Service Level Management means managing IT as a services business, where resources are deployed and managed to a discrete set of defined services, and where the quality of those services are measured by the customer. IT Infrastructure Library (ITIL) provides industry best practices for establishing a Service Level Management framework.

What is the IT Infrastructure Library (ITIL)?

ITIL is a customizable framework of industry best practices that promote quality IT Service Level Management. Built on a process-model view of controlling and managing operations, ITIL addresses the structure and skill requirements for an IT organization by presenting a comprehensive set of management procedures. ITIL is fast becoming the most popular process framework and the *de facto* standard for managing IT shops in the US and Europe.

Four features make ITIL unique:

- ◆ **Vendor-neutral, best practice guidance** – ITIL is a synthesis of ideas drawn from international IT practitioners.
- ◆ **Non-proprietary** – While the ITIL publications aren't free, anyone can apply ITIL concepts freely in their organization.
- ◆ **Comprehensive and consistent** – Rather than providing isolated advice, ITIL attempts to describe every key process in IT service management and to use consistent, common sense definitions and distinctions across each process.
- ◆ **Widely adopted** – encouraging industry alignment and making it a defensible choice for organizing the business of IT.

This section is from "ITIL for the CIO: Answers to Frequently Asked Questions" by David Pultorak In TechRepublic.com 23-May-06

Service Level Management within an ITIL Framework

(continued)

CHAPTER

4

The ITIL framework provides descriptive guidance on the following fundamental processes within IT operations.

Service Support Processes, including:

- ◆ Service Desk Function
- ◆ Incident Management
- ◆ Problem Management
- ◆ Change Management
- ◆ Configuration Management
- ◆ Release Management

Service Delivery Processes, including:

- ◆ Availability Management
- ◆ Capacity Management
- ◆ Financial Management
- ◆ Service Level Management
- ◆ IT Service Continuity Management

Recommended Boise ITIL Service Level Measures

CHAPTER

4

The following presents an overview of the recommended Boise ITIL Service Level Measures approach.

Service level measures should reflect overall customer satisfaction, as measured by meeting service level objectives and through periodic customer surveys. Boise I&T service level measures should be defined for all four IT operational divisions:

◆ IT Customer Services – Help Desk Management:

- ◆ Service desk productivity – Service requests and problem resolution statistics, including Tier-1 problems resolved over the phone
- ◆ Quality – Call-back rate if problem not resolved on initial response for Tier-1 problems
- ◆ Timeliness – Elapsed time to resolution for Tier-2 problems
- ◆ User productivity – Self-service portal with ability to enter/query service requests and search an FAQ or knowledgebase
- ◆ IT productivity – Incidents resolved per computer systems technician
- ◆ Cost – Average customer service labor cost per PC

◆ IT Infrastructure Services:

- ◆ Reliability – Count of unplanned outages and elapsed downtime
- ◆ Capacity – Ability to plan for adequate capacity, availability and response times
- ◆ Efficiency – Use of event monitoring and problem resolution tools
- ◆ Security – Network security and identity management
- ◆ Productivity – Change and configuration management
- ◆ Cost – Average server administration labor cost per server

◆ IT Application Services:

- ◆ Effectiveness – Knowledgeable application specific support and timely problem resolution

◆ Planning and Administration:

- ◆ Project management – Percentage of projects delivered on-time and on-budget
- ◆ Purchasing – “Order-to-install” times for commonly purchased items

Implementing ITIL with Service Level Agreements

CHAPTER

4

The following describes a framework for implementing ITIL with service level agreements.

An IT service level agreement specifies the types of IT services to be provided to customers – both individual end-users and business units. SLAs can range in complexity and detail depending upon the nature of the systems supported and services provided. Using the ITIL framework, SLAs address negotiated parameters for systems availability and performance, service quality and response times, and related end-user commitments. See sample Service Level Agreement on following pages.

◆ **Service level agreement components, include:**

- ◆ Customer contact information
- ◆ Services covered – specifies which services are being provided
- ◆ IT operational group providing services – Customer Services, Application Services, Infrastructure Services or Planning and Administration
- ◆ Service support window – during business hours, after hours and weekend support
- ◆ Service level measures – operational performance and quality targets
- ◆ IT operational environments included – desktop, applications or infrastructure
- ◆ Acceptable methods for requesting services – phone, email and/or service request system
- ◆ Service performance tracking and reporting methods – daily & monthly performance against service level metrics
- ◆ Problem service request response metrics – call & email response rates, call-backs and problem resolution
- ◆ Roles and responsibilities:
 - Customer representative – provides user requirements and performance targets
 - IT Account Manager – manages the customer relationship
 - IT Customer Services Manager – provides service level commitments
- ◆ Service problem escalation procedures
- ◆ SLA contract period
- ◆ Cost of providing the services (if applicable)

Sample Service Level Agreement

CHAPTER

4

sample

ABC IT Operations Service Level Agreement ABC Customer Support Center

Customers: Corporate Staff, Retail Banking Branch Personnel, Commercial Banking Personnel, Wire Transfer Personnel, and ATM/EFT Support Personnel

Mission: It is the mission of the ABC Customer Support Center to act as the information services focal point to all ABC's customers by providing effective and timely support of daily production support and other IT products and services.

Location: Corporate Office, Operations Centers, Branch Facilities

Contact Name: Abbey Lane, Customer Service Manager, ABC Customer Support Center

Contact Info: Phone: 800-123-4567 Email: alane@abc.com

Services Covered: Perform first level support for all mainframe applications, client server applications, LAN, Telecom Systems, PC's, software applications, and general technology inquiries, and manage resolution of 2nd and 3rd level support.

Scope:

Business Hours:

6:00am - 8:00pm (MST) Monday - Friday (non-holiday)

After Hours Support: (via on-call pager)

8:00pm - 6:00am Monday - Friday (non-holiday)

24 Hours Monday - Friday (holiday)

24 Hours Saturday and Sunday

Service Goal: Compliance of 85% for the service levels set forth in the following severity codes table

Severity Code	Customer Impact	Service Response to the Customer	Resolution Time
Severity 1	Catastrophic	15 minutes	60 minutes
Severity 2	Urgent	30 minutes	2 hours
Severity 3	Important	4 hours	8 hours
Severity 4	Work Order/ Non-Critical	4 hours	Per published lead-time*

* Lead-time Based

Environments Included:

- All mainframe and client server proprietary applications currently in use by customer base.
- All telecommunication and network equipment as approved by ABC Technology and Network Services Division.
- All standard PC hardware and associated software applications as approved by the ABC Technology Standards committee.

Method for Requesting Services:

- Requests are made via phone, email, or directly logging into the service request management system.

Service Tracking and Reporting Procedures:

- All requests are logged into the Service Management tracking system. Call record is completed by CS representative, or forwarded to appropriate level for research for completion. CS representative is responsible to ensure timely call closure per stated service objectives.
- Random follow-up will be independently conducted via Customer Satisfaction Surveys.

Sample Service Level Agreement (continued)

Service Metrics:

- 100% of all calls will be answered in a timely manner and with the following targets:

Category	Performance Criteria
Average Call Answer Time	___% Answered in < 20 seconds
1st Contact Resolution	___% of all contacts resolved at initial contact
Customer Satisfaction	___% of all service events receive a satisfactory or above rating
Average Call Length	___ DCP ___ PCP
Call Handle Rate	___%
Email Response Rate	___% within ___ hours

Reporting Methods:

- Daily management meetings will be conducted to review previous day's severity 1 and 2 service impacts
- Performance metrics will be reported monthly to each business unit manager
- Client surveys will be conducted weekly on 10% of random service requests. Reports will be published monthly, to customers, IT management, and CS representatives.

Customer Responsibilities:

- Provide your name, department name and location
- Provide your unique identifier (device number, terminal number, SS #)
- Provide clear description of the problem, indicating if alternatives are available

Provide individual to be contacted, if not you, and their phone number

Support Group Responsibilities:

- Log actions / activities to all Service Requests.
- Maintain current support matrix at all times.
- Maintain lead-time table for all customer request services. Notify the SLM Support Coordinator in writing when there are changes / modifications.
- Maintain and update documentation and solutions database for supported systems.
- Attend daily production management meeting.
- Ensure that the CSC personnel receive formal and informal technical training for all supported corporate and business unit applications and architectures.
- Maintain and report actual performance against the targets and goals identified in this contract.

SLA Contract Period:

- January 1, 200X - December 31, 200X (terms to be negotiated on an annual basis, two months prior to expiration)

Cost Allocation Process:

- \$XXX per month per each workstation

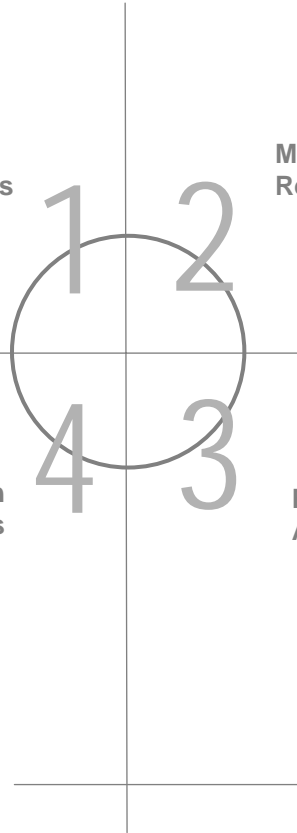
Business Unit Name	ABC Service Bureau
_____	_____
Authorized Signature	Authorized Signature
_____	_____
Date	Date
_____	_____

Key Findings

Major
Recommendations

Risks and Mitigation
Strategies

Recommended
Action Plan



First Year Project Plans

First Year Project Plans Overview

APPENDIX

A

An integral part of the *IT Organization Transition Plan*, this appendix presents high-level work breakdown structures and associated task descriptions for all projects slated to begin during the IT Strategic Plan's first year. It also includes estimated resource loading and suggested project success measures.

The following projects are included:

- A1. Implement HR and Financials Improvement Program
- A3. Develop geographic information system (GIS) integration
- A6. Complete utility billing implementation
- A7. Implement police time scheduling
- A9. Implement parking management
- A11. Implement integrated library management system
- DM1. Implement decision-making model
- DM2. Review Chief Information Officer (CIO) job description
- SD1. Implement organization recommendations
- SD2. Develop organization transition plan
- SD3. Develop operations standards and policies
- TI1. Optimize wired network plan
- TI2. Implement mobile wireless solution for PWD and PDS
- TI3. Implement desktop standards
- TI4. Consolidate data centers
- TI5. Update and test disaster recovery plan
- TI6. Improve telephony

First Year Project Plans Overview

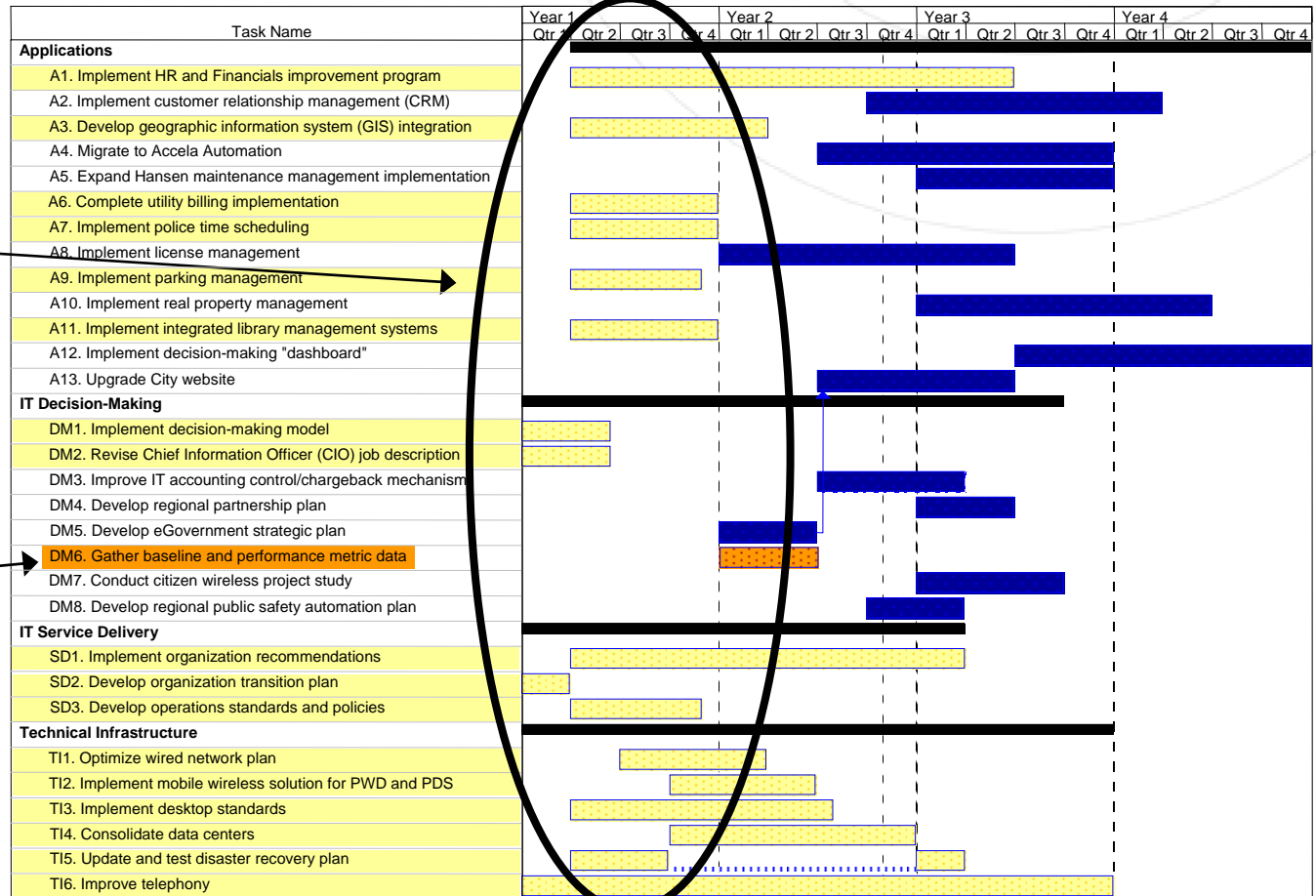
APPENDIX

A

The following workplan from the IT Strategic Plan highlights year 1 projects that are presented in this appendix.

This Transition Plan includes only those projects already started or beginning in year-one (2006) of the IT Strategic Plan

After further analysis, DM6 was moved to a year-two project (2007)



Application Projects

APPENDIX

A

A1. Implement HR and financials improvement program

COST: One-time cost: \$200,000 - \$450,000 | Recurring cost: \$0

DESCRIPTION:

This project enhances utilization of currently-installed PeopleSoft modules, implements unused components, and revises business processes as necessary. Initial focus should include timekeeping, cash receipting, and use of workflow. The effort should also examine and revise current business processes, to make better use of inherent software capabilities and reduce reliance on work-arounds. The eBIIS Functional Management Team should be convened for PeopleSoft governance and guidance.

1. **Complete upgrade to version 8.8**
2. **Validate key areas of need** – identified in the IT strategic plan: timekeeping, cash receipting, workflow.
3. **Conduct process re-engineering** – as necessary to ameliorate major problem areas, with a focus on eliminating unnecessary paper processes, redundant data entry, and shadow applications.
4. **Train users** – increasing proficiency to improve value received from the software.
5. **Implement additional PeopleSoft modules** – identified by the eBIIS Functional Management Team.

PROJECT SUCCESS MEASURES:

- ◆ Decreased redundant work processes
- ◆ Decreased or eliminated shadow applications
- ◆ Decreased redundant data entry and paper-based processes

ESTIMATED RESOURCE LOADING:

3 – 5 subject matter experts, 1 project manager, programmers as necessary, involvement of the eBIIS Functional Management Team.

Task Name	2007												2008														
	2nd Quarter			3rd Quarter			4th Quarter			1st Quarter			2nd Quarter			3rd Quarter			4th Quarter			1st Quarter			2nd Quarter		
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
A1. Implement PeopleSoft improvement program																											
Complete upgrade to version 8.8	█																										
Validate key areas of need	█		█																								
Conduct process re-engineering				█			█			█			█			█			█			█			█		
Train users							█			█			█			█			█			█			█		
Implement additional PeopleSoft modules																█			█			█			█		

Application Projects

APPENDIX

A

A3. Develop geographic information system (GIS) integration

COST: One-time cost: \$22,000 - \$94,000 | Recurring cost: \$18,800

DESCRIPTION:

This project completes migration to the new GIS data format and develops interfaces necessary to integrate GIS to applicable applications (e.g. Hansen, Accela, utility billing, public safety records management, etc.)

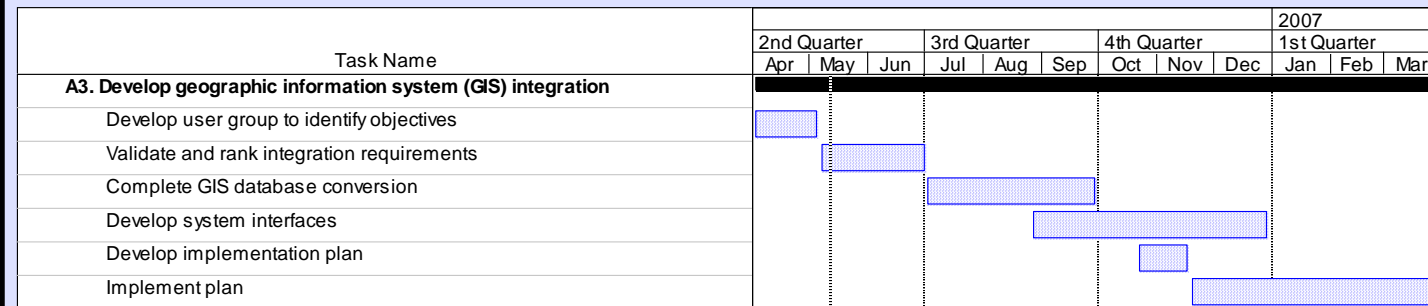
1. **Develop user group to identify objectives**
2. **Validate and rank integration requirements** – utility billing integration comes first, then rank other applications by importance and dependency
3. **Complete GIS database conversion**
4. **Develop system interfaces**
5. **Develop implementation plan** – prioritizing interface development to key applications: Accela, Hansen, license management, parking management, etc.
6. **Implement plan** – ensure complete migration to new GIS data format

PROJECT SUCCESS MEASURES:

- ◆ Documented count of applications integrated
- ◆ Database conversion completed

ESTIMATED RESOURCE LOADING:

3 – 5 subject matter experts, 1 project manager, programmers as necessary



Application Projects

APPENDIX

A

A6. Complete utility billing implementation

COST: One-time cost: \$0 - \$150,000 | Recurring cost: \$30,000

DESCRIPTION:

This project completes the delayed implementation of the utility billing application.

1. **Complete phase 1** – finalize application development and test
2. **Conduct user acceptance** – conduct follow-up examination and gather feedback
3. **Complete data conversion**
4. **Implement and conduct user training** – include documentation
5. **Develop ongoing support plan**
6. **Refine phase II requirements** – conduct focus groups and interviews to refine business needs
7. **Begin phase II** – conduct focus groups and interviews to determine business needs

PROJECT SUCCESS MEASURES:

- ◆ Decreased redundant data entry (labor effort)
- ◆ Decreased billing errors
- ◆ Increased customer satisfaction (via survey)

ESTIMATED RESOURCE LOADING:

4 – 6 subject matter experts during development and implementation, 1 project manager

Task Name	2007																			
	3rd Quarter			4th Quarter			1st Quarter			2nd Quarter			3rd Quarter			4th Quarter				
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
A6. Complete utility billing implementation																				
Complete phase 1																				
Conduct user acceptance																				
Complete data conversion																				
Implement and conduct users training																				
Develop ongoing support plan																				
Refine phase II requirements																				
Begin Phase II																				

Application Projects

APPENDIX

A

A7. Implement police time scheduling

COST: One-time cost: \$60,000 - \$75,000 | Recurring cost: \$15,000

DESCRIPTION:

This project implements specialized automated support to meet the unique police shift scheduling demands of the Boise Police Department.

1. **Complete assessment/requirements analysis** – including business process analysis and documentation, functional and technical requirement documentation.
2. **Design and build application in PeopleSoft**
3. **Implement application** – utilize subject matter experts to re-engineer business processes and implement software based on recommended schedule
4. **Test, train, and document** – conduct post-implementation review evaluation, develop training materials and user manual.

PROJECT SUCCESS MEASURES:

- ◆ Reduced schedule conflicts or gaps in shifts
- ◆ Decreased overtime labor costs (potential)

ESTIMATED RESOURCE LOADING:

3 – 5 subject matter experts during implementation, 1 – 2 FTEs of ongoing business unit IT labor

Task Name	2nd Quarter			3rd Quarter			4th Quarter		
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
A7. Implement police time scheduling	[Gantt bar spanning all months]								
Complete assessment/requirements analysis	[Gantt bar]								
Design and build application in PeopleSoft	[Gantt bar]								
Implement application				[Gantt bar]					
Test, train, and document				[Gantt bar]					

Application Projects

APPENDIX

A

A9. Implement parking management

COST: One-time cost: \$22,500 - \$100,000 | Recurring cost: \$20,000

DESCRIPTION:

This project implements up-to-date software necessary to capture, monitor, and issue citation-related data.

1. **Complete procurement** – a vendor has been selected as of April 2006
2. **Implementation** – utilize subject matter experts and vendor consultants to re-engineer business processes and implement software based on recommended schedules. This will include data conversion and migration, data integrity verification, and interface development
3. **Test and conduct post-implementation review evaluation**

PROJECT SUCCESS MEASURES:

- ◆ Increased revenue collected
- ◆ Decreased labor cost (tracking lost citations, errors, etc.)
- ◆ Project implemented on-time and on-budget

ESTIMATED RESOURCE LOADING:

1 – 3 subject matter experts during implementation, 1 – 2 FTEs of ongoing business unit support labor

Task Name	2nd Quarter			3rd Quarter		
	Apr	May	Jun	Jul	Aug	Sep
	A9. Implement parking management	-----				
Complete procurement	■					
Implementation		■				
Test and conduct post-implementation review evaluation				■		

Application Projects

A11. Implement integrated library management system

COST: One-time cost: budgeted | Recurring cost: budgeted

DESCRIPTION:

This project implements up-to-date software to support the management of library services and assets.

1. **Complete procurement**
2. **Implement software** – utilize subject matter experts and vendor consultants to re-engineer business processes and implement software based on recommended schedule.
3. **Test and conduct post-implementation review evaluation** – including additional training, follow-up, and vendor consultation.

PROJECT SUCCESS MEASURES:

- ◆ Decreased library assets lost
- ◆ Increased asset/book availability
- ◆ Increased customer service and satisfaction (via survey)

ESTIMATED RESOURCE LOADING:

1 – 3 subject matter experts during implementation, 1 – 2 FTEs of ongoing business unit IT labor

Task Name	2nd Quarter			3rd Quarter			4th Quarter		
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	A11. Implement integrated library management systems								
Complete procurement									
Implement software									
Test and conduct post-implementation review evaluation									

Decision Making Projects

APPENDIX

A

DM1. Implement decision-making model

COST: One-time cost: \$0 - \$50,000 | Recurring cost: \$0

DESCRIPTION:

This project establishes the governance processes and attendant roles and responsibilities outlined in chapter 3 of the IT Strategic Plan. The objective is to identify and fill gaps between existing project prioritization/approval process and strategic plan recommendations.

1. **Refine components of model** – Develop supporting tools, including project summary, business case, concept memo, timing of prioritization efforts. Gain planning approval.
2. **Assess implementation barriers** – evaluate current support for the model, identify blocking events or issues
3. **Develop communication plan:**
 - Craft value messages about the model tailored to each audience – IBT, CIO, departments, City Manager/Mayor
 - Identify key messages, audience groups, timing, and delivery mechanisms
 - Communicate and collect feedback to ensure understanding
4. **Operationalize** – Begin using the model (e.g. departments develop project requests)
5. **Assess performance (optional)** – interview or survey those impacted for feedback and capture lessons learned for process improvement

PROJECT SUCCESS MEASURES:

- ◆ Supporting tools completed
- ◆ Process followed for 2006/2007 budget cycle

ESTIMATED RESOURCE LOADING:

10 – 20 days effort from CIO, project manager, and IBT

Task Name	2006					
	1st Quarter			2nd Quarter		
	Jan	Feb	Mar	Apr	May	Jun
DM1. Implement decision-making model						
Refine components of model	■					
Assess implementation barriers			■			
Develop communication plan				■		
Operationalize					■	

Decision Making Projects

APPENDIX

A

DM2. Revise Chief Information Officer (CIO) job description *

COST: One-time cost: \$0 - \$10,000 | Recurring cost: \$0

DESCRIPTION:

This project strengthens the CIO position to increase authority over city-wide IT and centralize responsibility for all IT standards.

1. **Finalize job description** – develop changes in role, authority and reporting relationships
2. **Communicate changes** – CIO or Mayor/City Manager sends message to audiences as identified in communication plan

PROJECT SUCCESS MEASURES:

- ◆ New job description published

ESTIMATED RESOURCE LOADING:

Some limited effort required from CIO, Human Resources, project manager and administrative staff

Task Name	2006					
	1st Quarter			2nd Quarter		
	Jan	Feb	Mar	Apr	May	Jun
DM2. Revise Chief Information Officer (CIO) job description						
Finalize job description						
Communicate changes						

Service Delivery Projects

APPENDIX

A

SD1. Implement organization recommendations

COST: One-time cost: \$0 - \$200,000 | Recurring cost: \$0

DESCRIPTION:

This project restructures the existing city-wide deployment of IT resources, centralizing responsibility for “commodity” IT services under the I&T Department – in accordance with the recommendations outlined in chapter 3 of this plan.

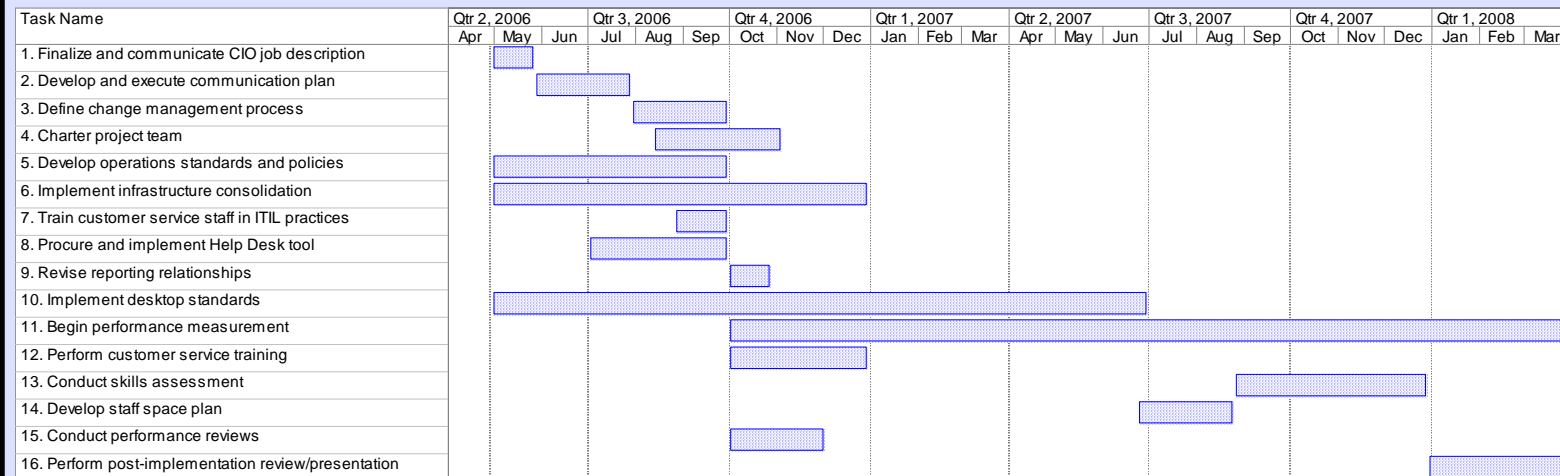
See chapter 2 for task descriptions.

PROJECT SUCCESS MEASURES:

- ◆ Transition completed
- ◆ Projected infrastructure and labor economies of scale achieved

ESTIMATED RESOURCE LOADING:

4 – 6 subject matter experts who comprise the Transition Management Team, from finance, HR, IT, legal. CIO and project manager as needed



Service Delivery Projects

APPENDIX

A

SD2. Develop organization transition plan

COST: One-time cost: \$0 - \$100,000 | Recurring cost: \$0

DESCRIPTION:

This project develops a detailed plan for making the recommended organization changes, addressing timing, personnel, budget, and service level concerns.

1. **Conduct interviews and gather information** – PTI interviews key stakeholders and leverages existing information gathered from the strategic IT plan
2. **Conduct CIO clarifying session** – PTI meets with Boise CIO to clarify issues and complications anticipated with the transition, resolving them accordingly
3. **Develop and deliver plan** – the timed plan includes a series of recommended tasks intended to smooth the transition and maintain business continuity

PROJECT SUCCESS MEASURES:

- ◆ Delivery of transition plan

ESTIMATED RESOURCE LOADING:

CIO, project manager, and staff as needed

Task Name	2006			
	1st Quarter			2nd Q
	Jan	Feb	Mar	Apr
SD2. Develop organization transition plan				
Conduct interviews and gather information				
Conduct CIO clarifying session				
Develop and deliver plan				

Service Delivery Projects

APPENDIX

A

SD3. Develop operations standards and policies

COST: One-time cost: \$0 - \$80,000 | Recurring cost: \$0

DESCRIPTION:

This project involves the development of standards and policies around IT security, privacy, computer use, and the formal documentation of standards and policies surrounding customer communications and department operations, including project tracking, resource planning, cross-training, etc. Overall, key activities include standards and policies meetings, documentation of results, documentation review and revision, sign-off, and dissemination.

1. **Create standards committee** – charter group and assign members
2. **Assess and identify gaps** – incorporate relevant ITIL practices as needed
3. **Conduct process redesign efforts as needed** – ensure alignment exists with new standards and policies
4. **Communicate changes** – create an improvement plan with staff and key leadership. Convey (via communications plan) benefits to staff
5. **Publish policies/procedures** – ensure stakeholders are aware of changes

PROJECT SUCCESS MEASURES:

- ◆ Documented and published policies and standards (ITIL-informed)

ESTIMATED RESOURCE LOADING:

40 – 80 days of effort from CIO, IBT, PMO, and subject matter experts



Technical Infrastructure Projects

APPENDIX

A

TI1. Develop and implement wired network plan

COST: One-time cost: \$0 - \$150,000 | Recurring cost: \$0

DESCRIPTION:

This project utilizes a network specialist to assess the existing network architecture, and develops a comprehensive plan to address bandwidth, wireless, mobile communications, quality-of-service, stability and connectivity needs, and infrastructure/data security solutions.

1. **Complete phase 1 tasks** – complete VPN site-to-site development, finalize project plan to include Fire Stations purchase of 'Clear Wire' service. Complete configuration tasks for ASA and PIX.
2. **Complete project design analysis** – continue work on phases 2, 3, and 4
3. **Assess current infrastructure** – Evaluate the existing network architecture, defining areas of weaknesses (e.g., security flaws, low bandwidth, etc.)
4. **Define and forecast needs** – Assess current and future demands for throughput, defining gaps in the present network architecture
5. **Develop and implement plan** – Document findings and present a timed and costed implementation plan for bandwidth, wireless infrastructure, mobile communications, quality-of-service, stability and connectivity needs, and security solutions

PROJECT SUCCESS MEASURES:

- ◆ Timed and costed project plan completed
- ◆ Decreased system intrusions
- ◆ Increased bandwidth and network performance

ESTIMATED RESOURCE LOADING:

3 – 5 subject matter experts during assessment phase and 1 project manager

Task Name	3rd Quarter			4th Quarter			2007 1st Quarter		
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
	TI1. Optimize wired network plan								
Complete phase 1 tasks	█	█	█						
Complete project design analysis				█	█	█			
Assess current infrastructure				█					
Define and forecast needs					█				
Develop and implement plan							█	█	█

Technical Infrastructure Projects

APPENDIX

A

TI2. Implement mobile wireless solution for PWD and PDS

COST: One-time cost: \$5,000 - \$36,000 | Recurring cost: \$48,000

DESCRIPTION:

This project deploys a standard city-wide wireless connectivity solution for mobile computing (i.e., a single contract with a cellular provider and cellular modems).

1. **Develop PWD and PDS project team**
2. **Define functional and technical requirements** – leverage requirements to develop an RFP
3. **Conduct procurement** – Conduct preliminary market research, release RFP, evaluate and score vendor responses, invite finalists to give scripted demonstrations, select vendor and negotiate contract
4. **Implement solution** – Utilize subject matter experts and vendor consultants to re-engineer business processes and implement software based on recommended schedule. Conduct post-implementation review evaluation.

PROJECT SUCCESS MEASURES:

- ◆ Support standards created and documented
- ◆ Increased customer satisfaction (internal and external) via survey

ESTIMATED RESOURCE LOADING:

1 – 2 subject matter experts during implementation, 0.5 – 1 FTEs for ongoing I&T support labor

Task Name	2007								
	4th Quarter			1st Quarter			2nd Quarter		
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
TI2. Implement mobile wireless solution for PWD and PDS									
Develop PWD and PDS project team									
Define functional and technical requirements									
Conduct procurement									
Implement solution									

Technical Infrastructure Projects

APPENDIX

A

T13. Implement desktop standards

COST: One-time cost: \$205,328 - \$410,656 | Recurring cost: \$56,340

DESCRIPTION:

This project institutes standardized operating systems and configurations for the City's personal computers.

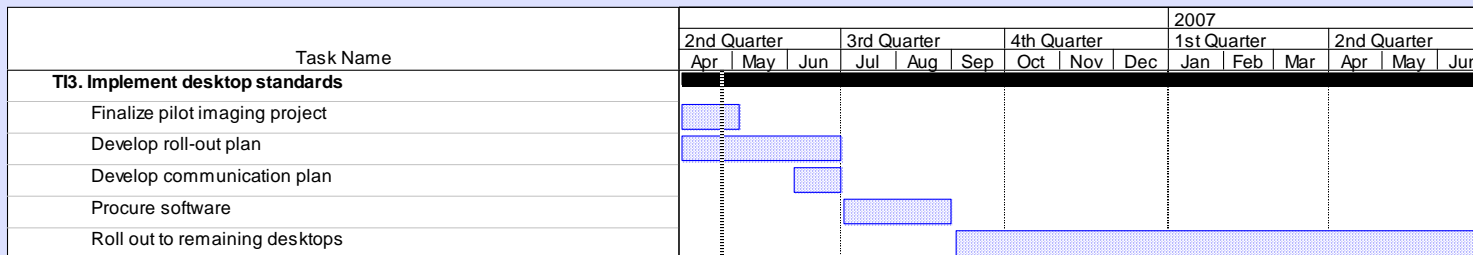
1. **Finalize pilot imaging project** – documenting formalized policies and procedures including user requirements.
2. **Develop roll-out plan** – develop a timed method for changes that ensure minimum disruption to users and business continuity
3. **Develop communication plan** – ensure users understand the change and the impact and benefits for them
4. **Procure software** – Procure necessary upgrade licenses and desktop management software. Include remote system management tool
5. **Roll out to remaining desktops** – Upgrade operating systems and associated desktop management tools.

PROJECT SUCCESS MEASURES:

- ◆ Increased percentage of standardized desktops
- ◆ Decreased licensing costs
- ◆ Decreased maintenance costs
- ◆ Decreased problem resolution time
- ◆ Decreased upgrade deployment time
- ◆ Decreased system intrusions

ESTIMATED RESOURCE LOADING:

3 – 5 subject matter experts during implementation



Technical Infrastructure Projects

APPENDIX

A

TI4. Consolidate data centers

COST: One-time cost: \$253,825 - \$507,650 | Recurring cost: \$0

DESCRIPTION:

This project reduces the number of “data centers” at the City. It relocates and consolidates servers, and moves the City’s infrastructure to a more centralized, secure, and professionally-managed environment.

1. **Assess present architecture** – define functional and technical requirements. Leverage the requirements to develop a RFP. Assess feasibility to include airport
2. **Evaluate in-house versus outsourced resources** – identify approach based on quality and availability of resources. decide on approach
3. **Develop consolidation plan** – conduct preliminary market research, release RFP, evaluate and score vendor responses, invite finalists to give scripted demonstrations, select vendor and negotiate contract
4. **Implement** – utilize subject matter experts and vendor consultants to re-engineer business processes and implement software
5. **Conduct post-implementation review evaluation**

PROJECT SUCCESS MEASURES:

- ◆ Decreased number of redundant servers, measured by total number of servers as well as ratios of workstations to file/print servers and workstations to email/calendaring servers
- ◆ Increased percentage of servers centralized and standardized
- ◆ Decreased system intrusions
- ◆ Decreased server and server administration costs
- ◆ Decreased data recovery and disaster recovery response time

ESTIMATED RESOURCE LOADING:

3 – 5 subject matter experts, entire City staff participation during testing

Task Name	2007																	
	3rd Quarter			4th Quarter			1st Quarter			2nd Quarter			3rd Quarter			4th Quarter		
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
TI4. Consolidate data centers																		
Assess present architecture	■																	
Evaluate in-house vs. outsourced resources	■																	
Develop consolidation plan			■															
Implement				■														
Conduct post-implementation review evaluation																■		

Technical Infrastructure Projects

APPENDIX

A

T15. Update and test disaster recovery plan

COST: One-time cost: \$0 - \$200,000 | Recurring cost: \$75,000

DESCRIPTION:

This project provides updated procedures for the resumption of IT services following a calamity. It also simulates disaster scenarios to ensure viability of the plan.

1. **Develop requirements and conduct business impact analysis** – utilize subject matter experts in the business units, particularly those in emergency services (e.g., public safety) to define requirements. In addition, the business impact analysis defines critical systems, processes, and functions and the length of time the business units can survive without access to systems.
2. **Update disaster plan** – leveraging the information from the task above, update the existing disaster recovery plan
3. **Test phase** – simulate a high-probability event and execute the plan to test the robustness of the plan

PROJECT SUCCESS MEASURES:

- ◆ Plan is current, completed, and in place
- ◆ Testing completed
- ◆ Funds appropriated for recovery

ESTIMATED RESOURCE LOADING:

3 – 5 subject matter experts during planning process

Task Name	2007												2008											
	2nd Quarter			3rd Quarter			4th Quarter			1st Quarter			2nd Quarter			3rd Quarter			4th Quarter			1st Quarter		
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
T15. Update and test disaster recovery plan																								
Develop requirements and conduct business impact analysis																								
Update disaster recovery plan																								
Test phase																								

Technical Infrastructure Projects

APPENDIX

A

T16. Improve telephony

COST: One-time cost & Recurring cost: Requested via Service Alternative for FY07

DESCRIPTION:

This project leverages the Airport's infrastructure (e.g. PBX, switches) to upgrade and enhance the City's aging telephone system.

1. **Conduct feasibility study** – assess the feasibility of using Airport infrastructure to support the City's telephony needs
2. **Develop upgrade plan** – leveraging information from the feasibility study, develop a plan of action including risks and mitigation
3. **Procure hardware and implement** – procure necessary hardware items and upgrade and centralize telephony infrastructure at the Airport

PROJECT SUCCESS MEASURES:

- ◆ Decreased number of dropped calls
- ◆ Call signal quality / connectivity improved
- ◆ Decreased line costs

ESTIMATED RESOURCE LOADING:

1 – 2 subject matter experts during implementation, 0.5 – 1.0 FTE increase in ongoing support

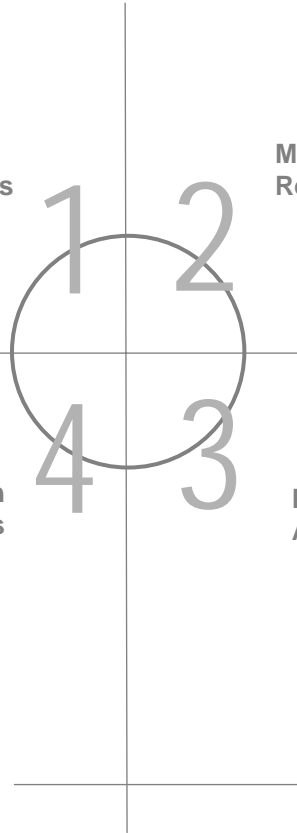
Task Name	2007												2008												
	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter			1st Quarter			2nd Quarter			3rd Quarter			4th Quarter			
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
T16. Improve telephony																									
Conduct feasibility study																									
Develop upgrade plan																									
Procure hardware and implement																									

Key Findings

Major
Recommendations

Risks and Mitigation
Strategies

Recommended
Action Plan



**Suggested Performance
Targets**

Suggest Performance Targets Overview

APPENDIX

B

PTI recommended a list of potential IT service level measures in chapter 4. These measures were intended to track overall customer satisfaction levels as well as operational performance levels (i.e., problem resolution rate).

This chapter presents recommended performance targets based on best practices and PTI's professional experience with over 80 municipal planning engagements.

Note, these targets represent PTI's suggestions.

Ultimately, it is up to I&T to establish targets, working with individual departments and service level agreements, as appropriate.

Recommended Boise ITIL Service Level Measures

APPENDIX

B

The following presents an overview of the recommended Boise ITIL Service Level Measures approach.

Service level measures should reflect overall customer satisfaction, as measured by meeting service level objectives and through periodic customer surveys. Boise I&T service level measures should be defined for all three IT operational service units:

IT Customer Services

Application Services

Infrastructure Services

Planning and Administration

Suggest IT Customer Services Targets

APPENDIX

B

The following presents suggested IT customer services targets.

IT Customer Services – Help Desk Management	Target																				
Service desk productivity – Service requests and problem resolution statistics, including Tier-1 problems resolved over the phone	80% resolution on the phone																				
Quality – Call-back rate if problem not resolved on initial response for Tier-1 problems	<10% re-opened trouble tickets due to erroneous initial resolution																				
Timeliness – Elapsed time to resolution for Tier-2 problems	<table border="1"> <thead> <tr> <th>Severity Code</th> <th>Customer Impact</th> <th>Service Response to the Customer</th> <th>Resolution Time</th> </tr> </thead> <tbody> <tr> <td>Severity 1</td> <td>Catastrophic</td> <td>15 minutes</td> <td>60 minutes</td> </tr> <tr> <td>Severity 2</td> <td>Urgent</td> <td>30 minutes</td> <td>2 hours</td> </tr> <tr> <td>Severity 3</td> <td>Important</td> <td>4 hours</td> <td>8 hours</td> </tr> <tr> <td>Severity 4</td> <td>Work Order/ Non-Critical</td> <td>4 hours</td> <td>Per published lead-time*</td> </tr> </tbody> </table> <p>* Lead-time based</p>	Severity Code	Customer Impact	Service Response to the Customer	Resolution Time	Severity 1	Catastrophic	15 minutes	60 minutes	Severity 2	Urgent	30 minutes	2 hours	Severity 3	Important	4 hours	8 hours	Severity 4	Work Order/ Non-Critical	4 hours	Per published lead-time*
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Severity 3	Important	4 hours	8 hours																		
Severity 4	Work Order/ Non-Critical	4 hours	Per published lead-time*																		
User productivity – Self-service portal with ability to enter/query service requests and search an FAQ or knowledgebase	Reduction in call volumes after self-service portal goes live																				
IT productivity – Incidents resolved per computer systems technician	Track and trend closed tickets per technician by severity code																				
Cost – Average customer service labor cost per PC	25% reduction over current cost after standardized desktops, images are complete, etc.																				

Suggest IT Infrastructure Services Targets

APPENDIX

B

The following presents suggested IT infrastructure services targets.

IT Infrastructure Services	Target
Reliability – Count of unplanned outages and elapsed downtime	99.99% uptime during business hours
Capacity – Ability to plan for adequate capacity, availability and response times	Average response time to online transactions from moment request is made to the complete display of the response: 2 seconds
Efficiency – Use of event monitoring and problem resolution tools	Tools are in place
Security – Network security and identity management	Zero unauthorized entry to City systems
Productivity – Change and configuration management	<1 change management incidents per month
Cost – Average server administration labor cost per server	25% reduction over current cost

Suggest Application Services Targets

APPENDIX

B

The following presents suggested application services targets.

Application Services	Target																				
<p>Effectiveness – Knowledgeable application specific support and timely problem resolution</p>	<table border="1"> <thead> <tr> <th data-bbox="953 519 1081 582">Severity Code</th> <th data-bbox="1081 519 1348 582">Customer Impact</th> <th data-bbox="1348 519 1614 582">Service Response to the Customer</th> <th data-bbox="1614 519 1843 582">Resolution Time</th> </tr> </thead> <tbody> <tr> <td data-bbox="953 582 1081 619">Severity 1</td> <td data-bbox="1081 582 1348 619">Catastrophic</td> <td data-bbox="1348 582 1614 619">15 minutes</td> <td data-bbox="1614 582 1843 619">60 minutes</td> </tr> <tr> <td data-bbox="953 619 1081 656">Severity 2</td> <td data-bbox="1081 619 1348 656">Urgent</td> <td data-bbox="1348 619 1614 656">30 minutes</td> <td data-bbox="1614 619 1843 656">2 hours</td> </tr> <tr> <td data-bbox="953 656 1081 694">Severity 3</td> <td data-bbox="1081 656 1348 694">Important</td> <td data-bbox="1348 656 1614 694">4 hours</td> <td data-bbox="1614 656 1843 694">8 hours</td> </tr> <tr> <td data-bbox="953 694 1081 762">Severity 4</td> <td data-bbox="1081 694 1348 762">Work Order/ Non-Critical</td> <td data-bbox="1348 694 1614 762">4 hours</td> <td data-bbox="1614 694 1843 762">Per published lead-time*</td> </tr> </tbody> </table> <p>* Lead-time based</p>	Severity Code	Customer Impact	Service Response to the Customer	Resolution Time	Severity 1	Catastrophic	15 minutes	60 minutes	Severity 2	Urgent	30 minutes	2 hours	Severity 3	Important	4 hours	8 hours	Severity 4	Work Order/ Non-Critical	4 hours	Per published lead-time*
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Severity 3	Important	4 hours	8 hours																		
Severity 4	Work Order/ Non-Critical	4 hours	Per published lead-time*																		
<p>Work order and project performance</p>	<p>75% of work orders and projects delivered on-time and on-budget.</p>																				

Suggest Planning and Administration Services Targets

APPENDIX

B

The following presents suggested planning and administration services targets.

Planning and Administration Services	Target
Project management	75% of projects delivered on-time and on-budget
Purchasing – Establish specific “order-to-install” times for commonly purchased items. For instance, workstation and pre-approved software.	<ul style="list-style-type: none">◆ Workstation: 15 business days◆ Pre-approved software: 15 business days