

King County

Quantifiable Business Case (QBC)

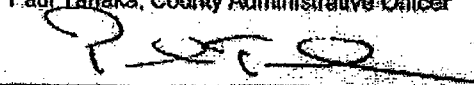
*Recommended Business Operations Model for King County
Enterprise Financial, Human Resources, and Budget Management
Program*

Program Charter

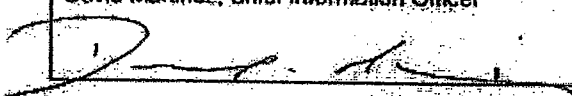
April, 2004

In support of the goals of King County as stated in Enterprise Financial, Human Resource, and Budget Management Vision and Goals statement, April 18, 2003, the members of the Quantifiable Business Case for Recommended Business Operations Model for King County Enterprise Financial, Human Resources, and Budget Management Program (QBC) Advisory Committee mutually endorse the project manager's and advisory committee's authorities and responsibilities described in the program charter. The undersigned members request the support of the program charter by the County Executive and County Council.

Department of Executive Services

Paul Tanaka, County Administrative Officer

Date: 4-2-04

Office of Information Resource Management

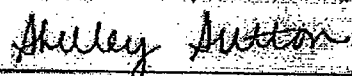
David Martinez, Chief Information Officer

Date: 4/8/04

Assessor

Rich Medved, Chief Deputy, DOA

Date: 4/9/04

Council

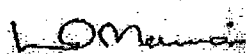
Shelley Sutton, Policy Staff Director, County Council

Date: 4/8/04

Superior Court

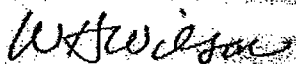
Paul Sherley, Chief Administrative Officer - Superior Court

Date: April 9, 2004

Prosecuting Attorney's Office

Leesa Manton, Deputy Chief of Staff - Prosecuting Attorney

Date: 4-9-2004

Sheriff's Office

Bill Wilson, Chief Financial Officer - Sheriff's Office

Date: 4/9/04

Budget Office

Steve Call, Budget Director - Budget Office

Date: 4/9/04

District Court

Tricia Crozier, CAO District Court

Date: 4-15-04

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Purpose

The purpose of this document is to describe the Program scope and the current project deliverables, project approach, work plan with deliverables schedule, project organization, structure, roles and responsibilities.

Upon Program endorsement by the Program Advisory Committee Members, the Members, and other program participants, are committed to this effort and their roles and responsibilities as described in the Charter, for the period of November 2003 thru June 2004 to support development of the Quantifiable Business Case Report, and further, for the period of the report presentations and until an action is taken to the Council.

For a future potential recommended business model implementation, an **implementation advisory committee** should be formed to advise on Business Model Recommendation implementation, and continue to advise and support the Payroll Initiatives Program (PIP) in order to ensure PIP alignment with the QBC Program.

Should the Program Charter require changes in order to improve it, the Charter will be amended, and submitted to the Advisory Committee for the amendment endorsement.

Background

Ten years after the merger of Metro and King County, King County government continues to rely on the operation of two sets of accounting and financial reporting systems and two sets of human resources (HR)/payroll systems. This contributes to "poor integration, redundant data entry, time-wasting reconciliation, and high systems maintenance, staff support and upgrade costs...County departments follow divergent policies and procedures, use inconsistent business processes and support multiple computing systems." (Vision and Goals Statement, p. 1)

In June 2003, the County took a major step forward in assuring the success of future efforts to successfully implement consolidated systems for one core financial system and one core HR/payroll system. Motion No. 11729 approved the Enterprise Financial, Human Resource, and Budget Management Vision and Goals Statement (see Appendix F). The Vision and Goals Statement is comprised of an overall vision statement and a list of guiding principles. It also identifies specific goals for each for the four business areas impacted by the existence of dual systems—financials, budget, HR and payroll.

The Vision and Goals Statement has far-reaching value to the County's continuing effort to implement a single countywide system. This document serves as the critical framework from which to launch a quantifiable business case (QBC) analysis and other preparatory work to ensure the financial business operations project success. It provides criteria against which to evaluate proposed projects that potentially impact the County's move to a single financial,

budget, HR, payroll system. Future efforts impacting these systems should be aligned with the vision, principles and goals contained in this key document.

Since adoption of the Vision and Goals Statement, the Chief Information Officer (CIO) and the County business sponsor (County Administrative Officer) have been directing follow-up efforts to maintain the momentum for the QBC program. Three of these efforts described below include the Roadblock Identification and Action Plan, the QBC Report, and the Payroll Initiatives Program.

The CIO and CAO established the QBC Program Advisory Committee to serve as a single oversight group for the QBC program. This group is the forum for providing advice and input on cross agency project issues. Members review draft project deliverables, and ensure that the perspectives and understanding of difference stakeholders are factored into policy level discussions and decisions. The Advisory Committee is providing oversight to the three efforts currently underway. It is likely that other projects will be added to their oversight responsibilities as implementation plans are developed next year.

Program Advisory Committee

The Program Advisory Committee was established in November 2003. Its members are: Paul Tanaka, CAO, Business Sponsor; David Martinez, CIO, Program Sponsor; Rich Medved, Chief Deputy, Department of Assessments; Shelley Sutton, Policy Staff Director, County Council; Leesa Manion, Deputy Chief of Staff, Prosecuting Attorney; Paul Sherfey, CAO, Superior Court and Bill Wilson, CFO, Sheriff's Office. In January 2004, Steve Call, Director, Office of Management and Budget, joined the Advisory Committee. In March 2004, Tricia Crozier, CAO, District Court joined the Advisory Committee.

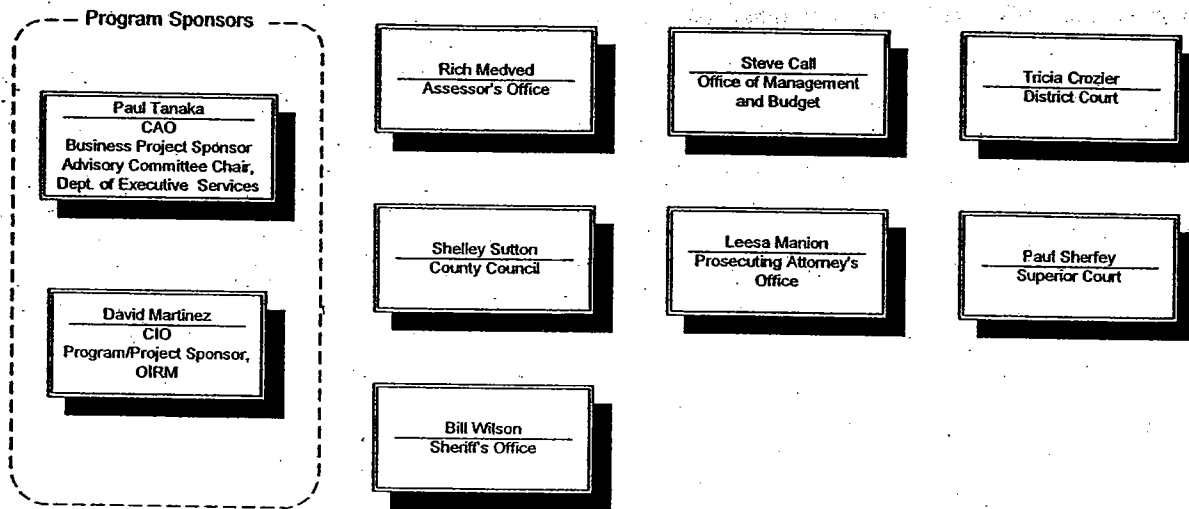


Figure 1. Program Advisory Committee Chart

Program Management

The Program Management Organization Chart with a brief description of major roles and responsibilities is show below.

The CAO's role and responsibilities include decision making on Program business components. The Finance and Business Operations Division Manager provides business advice to the Program Business Sponsor.

The CIO's role and responsibilities include decision making on all Program contract management, quality and technology components.

In rare instances where the best business decisions and best technology decisions may be in conflict, and the sponsors require input to reach an agreement, the Program Executive Sponsor will be consulted.

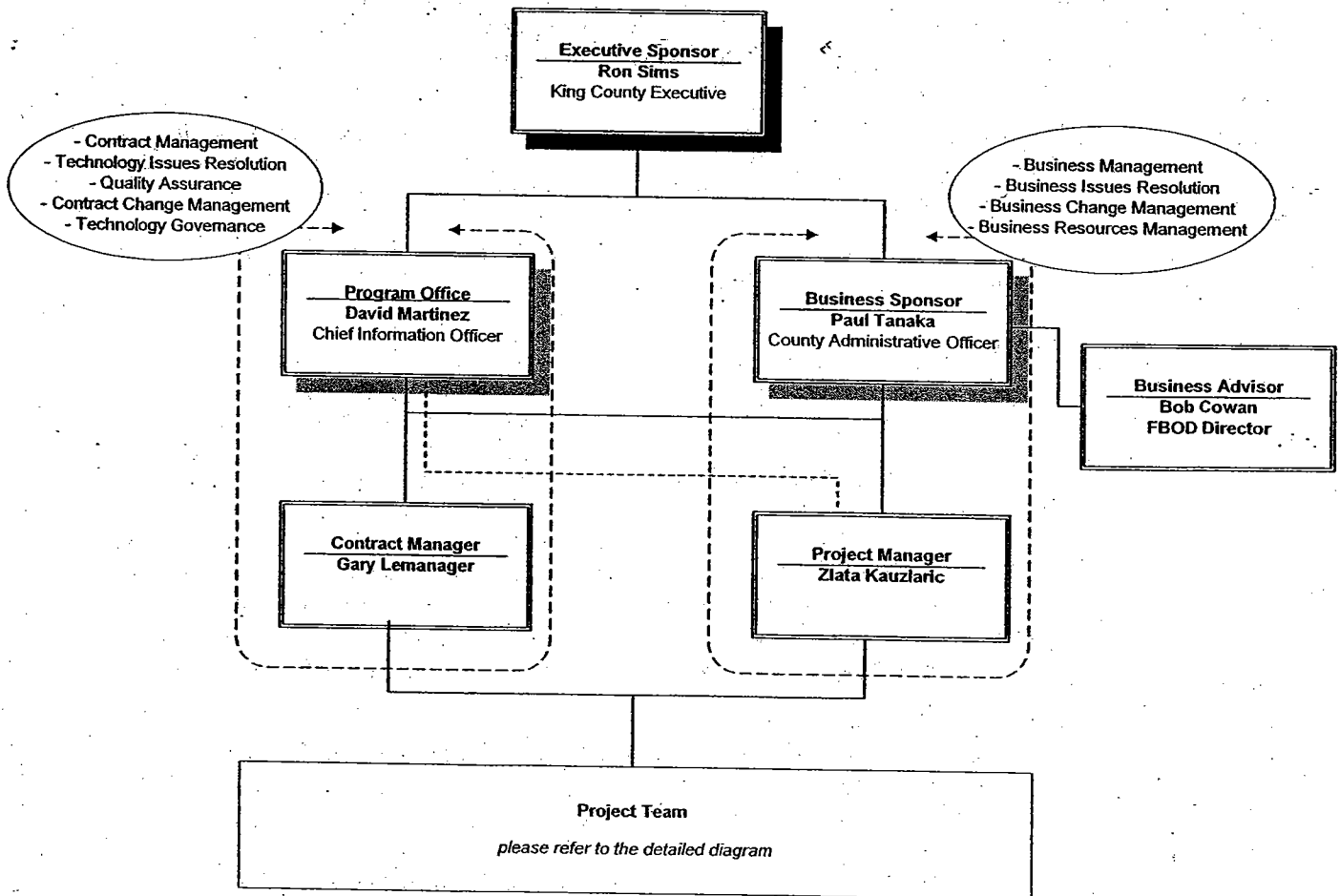


Figure 2. QBC Program Management Organizational Chart

Program Plan and Deliverables

The Program Plan with Timelines and Deliverables are depicted in Figure 3.

The Program deliverables to date include:

- **Vision and Goals Statement**

As described above, the Vision and Goals Statement provides the framework for future actions related to identifying and implementing a Business Operations Model for the County.

The Vision and Goals Statement is available at: <http://kcweb/oirm/projects/qbc.htm>

- **Roadblock Identification and Action Plan**

Motion No. 11729 adopting the Vision and Goals Statement also supported the development of a roadblocks action plan as a necessary step to assist decision makers in determining whether to move forward with transforming county business operations in the future.

A comprehensive list of roadblocks to implementing a single financial, payroll, HR, and budget system countywide has been compiled. Action plans have been developed identifying how each specific roadblock will be addressed.

The document, Roadblock Identification and Action Plan, is available at: <http://kcweb/oirm/projects/qbc.htm>

- **QBC Report**

A consultant team led by Dye Management will be recommending in June 2004 a Business Operations Model for the County based on best practices and industry standards. The consultant will be developing a business case justifying future investments into business model transformation and replacement of the current legacy systems.

The Vision and Goals Statement endorsed by the full elected leadership of King County provides the critical framework from which to launch a business case analysis and other preparatory work to ensure the financial business operations project success. It serves as the foundation for the current QBC project.

VISION STATEMENT

King County's financial, human resource and budget management functions are fully integrated, efficient and effective, and enhance the County's ability to provide essential services to its customers.

The QBC project was specifically authorized as a follow-up action through adoption of the Vision and Goals Statement. The objective of the QBC is to evaluate options and recommend a Business Operations Model for the County, including what this means in terms of implementing new financial, payroll, budget, and human resources

systems. The Vision and Goals Statement guiding principles and industry best practices will be reflected in the evaluation criteria against which the Business Operations Model options will be evaluated. Initial costs for implementing the recommendations and the Total Cost of Ownership (TCO) over a 10-year time frame are identified deliverables of the project. The target date for completion of this study is June 2004.

The project deliverables are described in this document. Additional information is available at <http://kcweb/oirm/projects/qbc.htm>.

Strategic Advisory Council (SAC) Review

The Program deliverables are subject to SAC review.

The Vision and Goals Statement document has been reviewed and endorsed by the SAC at their meeting of April 16, 2003.

The following Program deliverables will be presented to SAC for their review:

- Program Charter
- Roadblock Identification and Action Plan
- QBC Report

The SAC meetings are planned for July and September 2004.

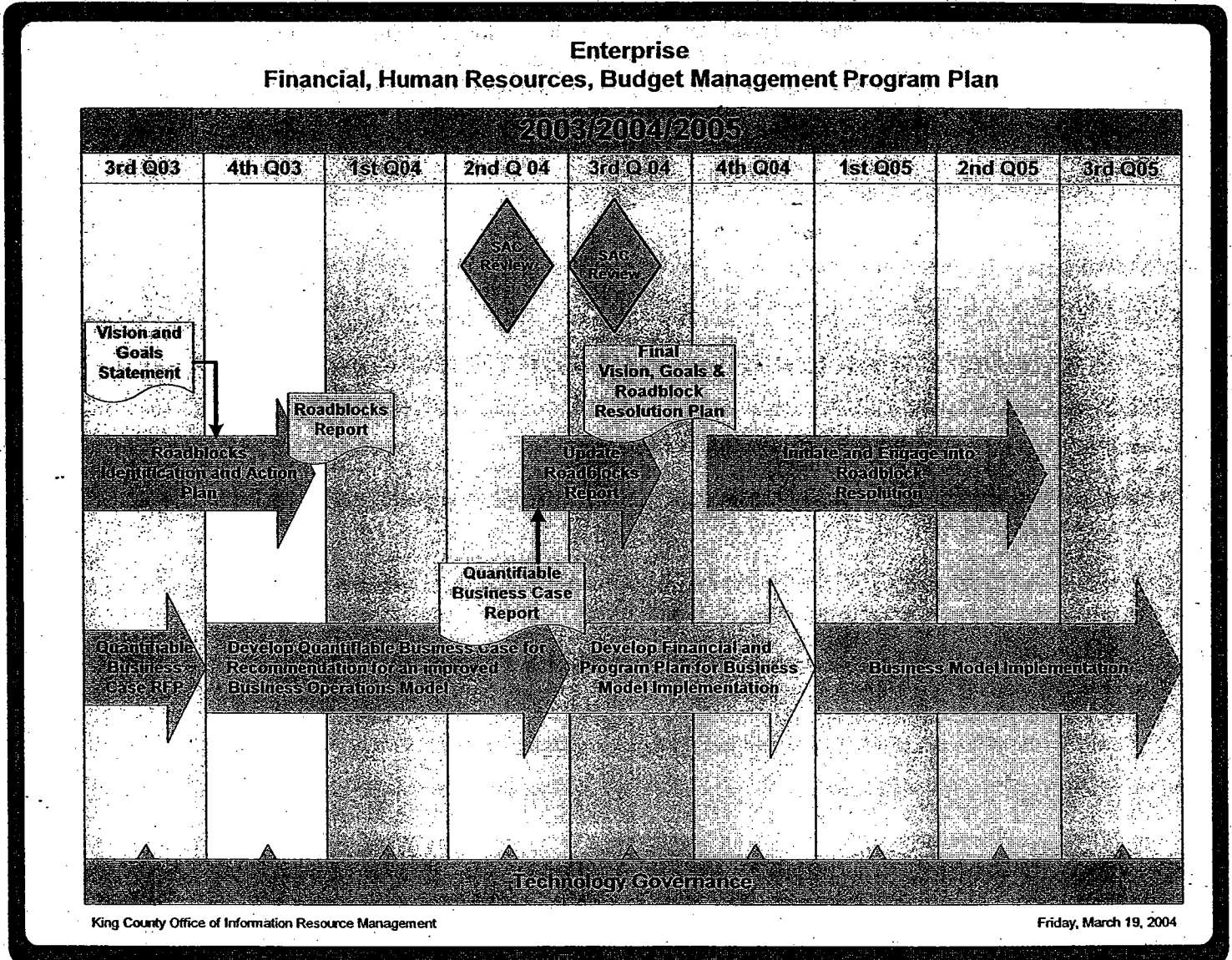


Figure 3. Program Timelines and Deliverables

Other Initiatives

The Finance and Business Operations Division (FBOD) is proceeding with a Payroll Initiatives Program (PIP) to improve the consistency and accuracy of payroll data and processes. Initial efforts will be focused on cleaning up payroll data in the MSA payroll system and documenting problems and inconsistencies in current processes. PIP will then develop proposals to improve and/or standardize payroll processes across one or both existing payroll systems.

PIP proposals related to payroll process changes will be reviewed for alignment with the QBC Program by the Advisory Committee. PIP will also provide project status reports to the Advisory Committee regarding the MSA standardization work.

PIP is a follow-up activity of the Vision and Goals Statement. Project efforts will be guided by the following Payroll Business Goals, which are contained in the Vision and Goals Statement:

Comply with labor agreements, as well as federal, state and County laws.

Reduce time required to capture time and process payroll, and shorten the lag between end of pay-period and payday.

Provide employees the information needed to validate that their pay stubs are accurate.

Provide timely and accurate paychecks.

Improve access to historical information.

Pay all employees on a common, bi-weekly, pay cycle from a single payroll system by migrating all employees to the PeopleSoft system.

Support labor distribution with a system that is compatible with PeopleSoft and the financial system that is implemented.

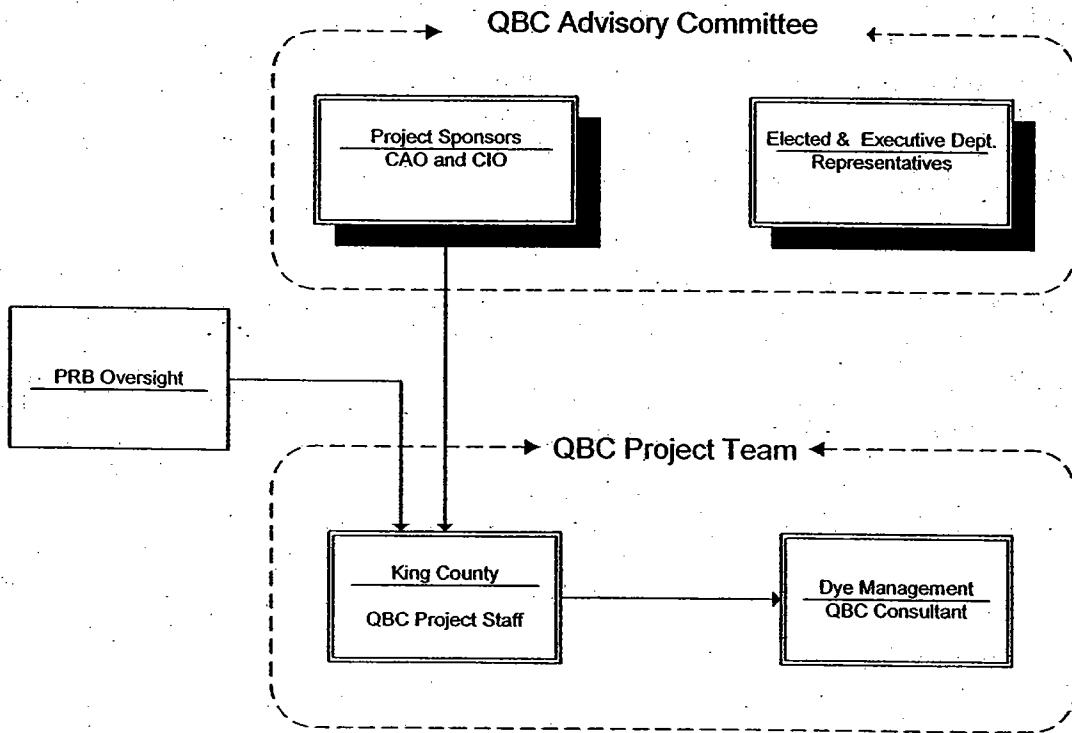
The PIP project charter is available at <http://financeweb/payben/payben.htm>.

QBC Project

This current phase of the QBC Program, Quantifiable Business Case Report, hereafter referred to as the QBC project, was initiated in July 2003 in response to Executive and Council directives to move forward to transform budget, financial and human resource business practices. The initial project scope was defined and the project target completion date was agreed to as June 2004. Gary Lemenager of OIRM was selected as contract manager and Zlata Kauzlaric of FBOD as project lead. The project team was organized in November/December 2003. Please see the following project organization chart of the team and related reporting relationships.

The remainder of this document describes the charter for the QBC project. Any future QBC Program phase will most likely require development of a charter specific for that phase.

1. Project Organization Chart

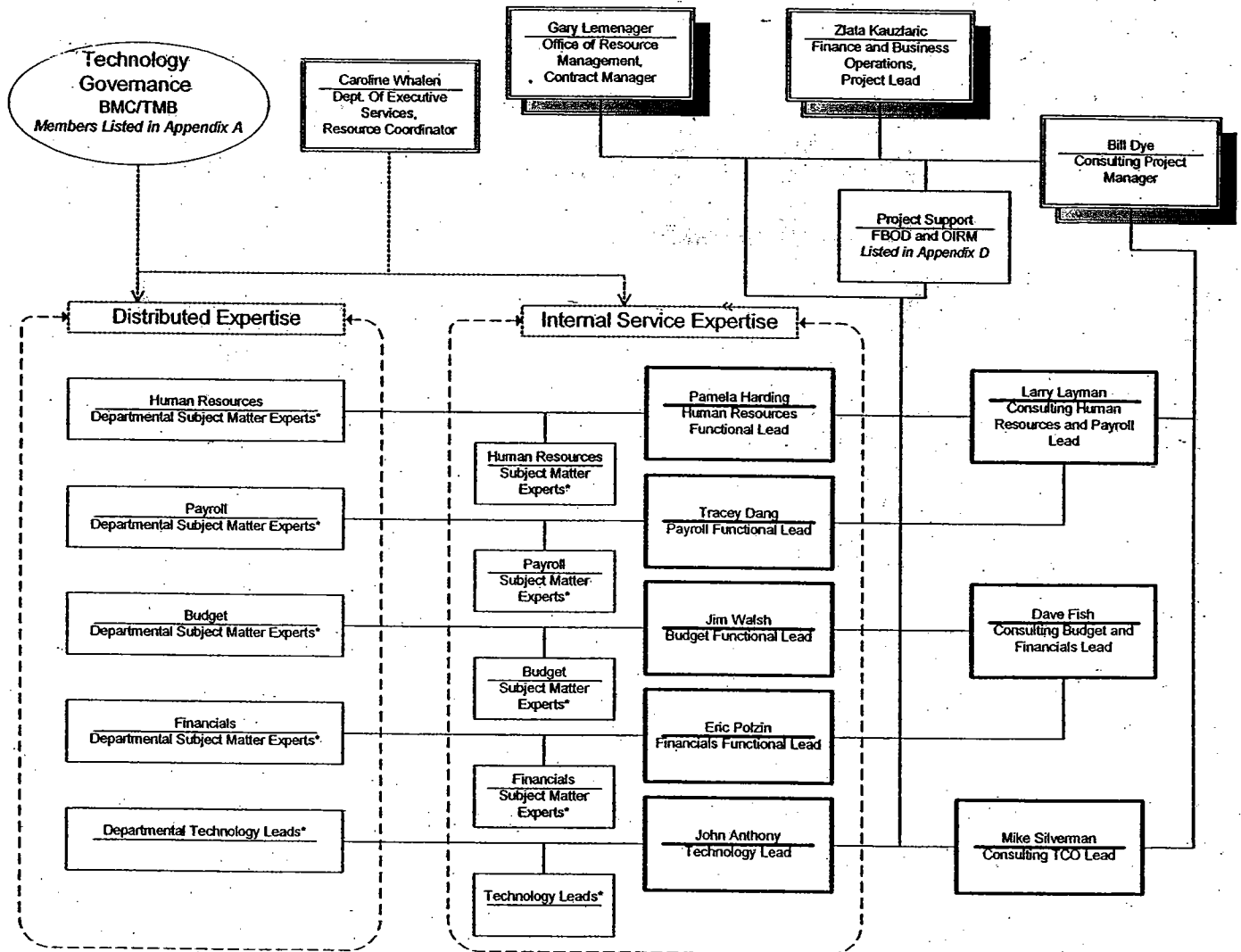


Project Organization Chart Legend:

- Solid reporting lines indicate relationships for the duration of the project involving assignment of tasks and progress monitoring evaluation of results.
- The project and advisory teams are grouped within dashed borders.

Figure 4. QBC Project Organization Chart

2. Project Team



*Subject Matter Experts and Technology Leads are listed in Appendix B. SMEs - Business Cost Data Providers are listed in the Appendix C.

Figure 5. QBC Project Team

3. Consulting

The consultant selected for this effort is Dye Management Group, INC. of Bellevue WA. Bill Dye is the president and the consulting manager for this project.

Dye has engaged a sub-contractor, Pacific Technologies, INC. (PTI) of Bellevue WA. Mike Silverman and Dan Borgen, are the company's Co-CEOs. PTI is the lead for the Total Cost Of Technology (TCO) report.

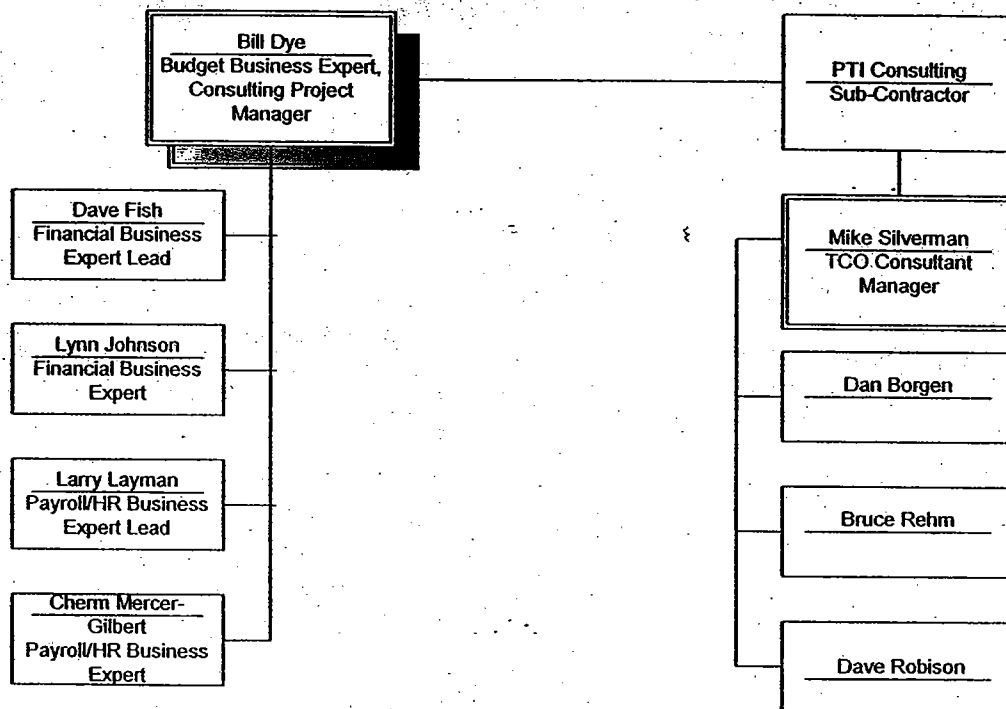


Figure 6. QBC Consulting Organizational Chart

4. Project Scope

Please see the project scope section in the Attachment E of this document for a complete description of project scope. The purpose of this project is to provide King County with a quantifiable business case which justifies replacing or improving the County's current budget, financials, human resources and payroll operations model and the array of distributed systems and the business practices that support them. The project assesses current business processes and operations models for King County budget, financials, human resources and payroll business area. The project will then develop a recommendation for transformation of the business model following the industry best business practices that would contribute to increased efficiency and effectiveness of King County government. The project will then develop a business case justifying future investments into business model transformation and replacement of the legacy systems. Guidelines for the project are defined in the Vision and Goals statement.

The total cost of information technology (TCO) is one of the project deliverables. The technology components that relate to business areas in the scope will be one of the evaluation criteria for the recommended business operations model.

Major deliverables of the project are:

Information Technology Cost Report

The project will analyze, define, and collect all information technology costs in the county, by agency, and in total. Costs for the four functional areas will be separately identified to provide the base technology costs for evaluating business operations model alternatives.

The Technology Cost Report will include:

- ✓ County's total costs for IT service allocation and support costs, including applications, system software, telecommunications, hardware, personal productivity tools, and support, as well as service efficiency and current year capital spending on IT.
- ✓ Level of centralization/decentralization/federation of the four major IT service areas: customer service, system services, business application services, and administration and planning. This information will help the County plan future changes to its service delivery approach. The report will also include measures such as IT operating spending as a percentage of total county operating spending and IT operating spending per citizen – figures that can be used to benchmark the County against similar organizations
- ✓ Updateable TCO Model. This deliverable consists of an Excel spreadsheet that automatically calculates major TCO components and associated instructions for using the spreadsheet. The Updateable Model will include a user manual with instructions for use and maintenance including description about the data source, tools for collecting the data, and how to enter the data.

Business Operations Model Report

Business Operations Model Assessment

The project will study the current business operation and processes in each of the business areas: budget, financials, human resources and payroll. The assessment will focus on the current processes evaluating the gaps, inefficiencies, and possible improvements. The assessment will identify the cost of performing the current business processes.

Business Operations Model Evaluation

The project will analyze the Assessment results and develop at least three options, including the status quo option, for a new business operating model that is conducive to implementing new financial, payroll, budget, and human resource systems. The options will be developed with efficiency in mind.

The options will be analyzed based on the pre-developed evaluation criteria resulting from the Vision and Goals Statement guiding principles and industry best practices.

Business Operations Model Recommendation

The project will recommend the Business Operational Model that best meets the county's objectives. The recommendation will be based primarily on the County's vision and goals as well as other factors including risks and cost. It will describe a recommended business operations model that transforms business practices countywide and provides for efficient and effective budgeting, financials, payroll and human resources management. The recommended model will be based on industry best practices, can be implemented in the county, and would be supported by available technology.

Quantifiable Business Case Report

The project will analyze both the financial and non-financial aspects of the recommended business operations model over a 10-year time frame, and include traditional financial calculations such as Net Cash Flow and Return on Investment, as well as business impacts, risk management, assumptions, and critical success factors. The Business Case will identify the business need and key performance indicators to justify the recommended transformation of business practices.

The Business Case will include the following components:

- ✓ **Costs.** Costs will include the initial costs of implementing the recommendations, and the estimated Total Cost of Ownership (TCO) over a 10-year period.
- ✓ **Benefits.** Benefits will be based on the results of the Assessment and Recommendation Tasks of the Business Operations Model Phase. The benefits will identify qualitative benefits and quantitative benefits.

- ✓ **Risks.** The risks associated with the transition will be identified with mitigation measures that can be taken to eliminate, reduce, or manage the risk. The costs of mitigation measures that are quantifiable will be computed.
- ✓ **Assumptions.** The assumptions used in developing the business case will be documented.

5. Project Approach

- The QBC project will follow a structured methodology for business model assessment. Existing business process and operations model documentation will be collected and evaluated. The focus groups including subject matter experts (SMEs) from all branches of government will provide the county's business expertise. The consultant brings to the project a solid expertise regarding best business practices, that have been in other governments, to assess and recommend potential improvements. Templates, surveys and interviews will be used to verify the existing model as well as the recommendation.
- The departmental technology leads (TCO Leads) will be coordinating data collection for the total cost of technology.
- The business experts (Functional Leads) indicated in the project organization chart will assist in developing the deliverables that document new policies, practices and procedures. In addition, they will play a key role in validating new business processes.
- Quality assurance (QA) will be structured within project activities with appropriate consulting resources committed to QA tasks.
- Major milestones and deliverables will be reviewed for scope compliance by the Project Lead and Contract Manager.
- Major deliverables will be reviewed by the project functional leads for content, quality and feasibility.
- Major deliverables will be reviewed for acceptance and approval for payment by the Project Sponsors.
- Major deliverables will be presented to Technology Governance for review and input. The Technology Governance will ensure a high level of departmental commitment through each department dedicating Subject Matter Experts and Technology Leads to participate in the project.
- Major deliverables will be reviewed by the project advisory committee for policy discussions and decisions.

6. Project Budget

The project budget has been established for project 344190 – Financial Business Case Analysis.

The Dec-03 project report, shows the budget of \$500,000, and lifetime to date of \$70,411.58. An amount of \$ 49,461.75 was spent for ITS Billing Study (as directed by Council).

The amount of \$429,588 is left for the QBC consulting contract and project work. The consulting contract is for the amount of \$427,900.

The project status and transactions reports are available at <http://ibisreps.metrokc.gov/>.

7. Project Work Plan

The project is scheduled for completion in June 2004.

A high level project timelines and major deliverables are presented below.

	DEC	JAN	FEB	MAR	APR	MAY	JUN
1.0 Infrate Project							
2.0 Determine Technology Costs							
3.0 Develop Business Operations Model							
4.0 Draft Business Case							
5.0 Present Business Case							

Figure 7. Project Deliverables and Timelines

8. Project Communication Map

The project is working with approximately 200+ county employees. In order to ensure for timely and quality communication the following communication map has been developed and implemented.

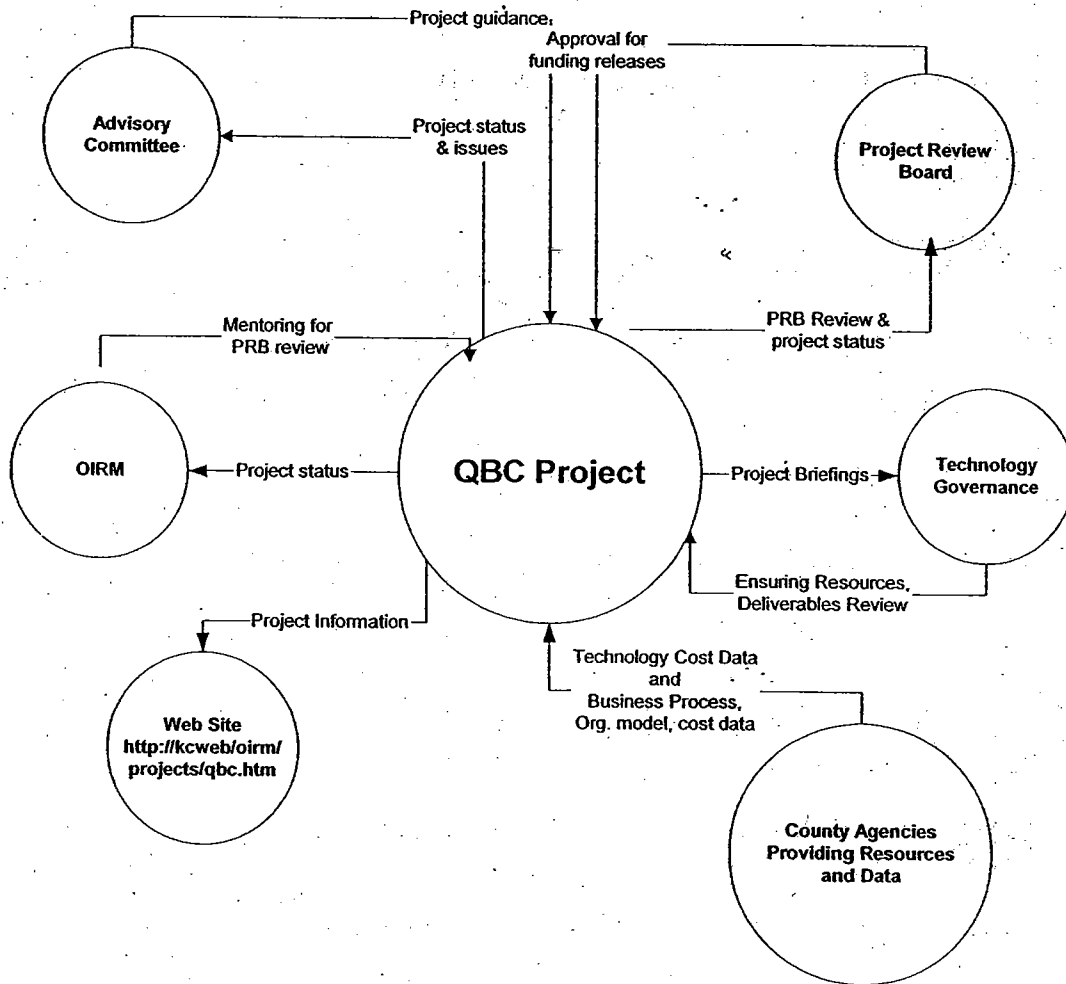


Figure 8. Project Communication Map

9. Project Charter

The QBC project charter clarifies the responsibilities and authorities of the Project Manager and the project Advisory Committee. Additionally, it describes the escalation process that will be used to obtain decisions on critical items that threaten the project schedule.

9.1 Project Manager

The Project Manager duties are provided by two individuals:

- Project Lead
- Contract Manager

The Project Lead and the Contract Manager act as the Project Manager. All project work is shared and communicated to detail, so each individual could act in each other behalf if needed.

The Project Lead has the following authority with regards to this project:

- Mobilize authorized project resources
- Resolve operational issues in collaboration with the Contract Manager and Consulting Manager
- Escalate selected operational issues and policy issues to the Contract Manager.

The Project Lead has the following responsibilities with regards to this project:

- Serve as a day-to-day contact for the consultants, functional leads, contact coordinator, project sponsors and advisory committee regarding project activities, issues, risks, quality, budget, and team
- Coordinate involvement of required county resources and work with the Resource Coordinator to obtain resources
- Monitor county resource involvement as defined in the scope
- Provide required project resources and logistics
- Review consultant deliverables verifying their compliance with the project scope and acceptance criteria
- Assist in BMC/TMB meetings and quarterly project briefings
- Assure compliance with project plan and standards by the project team

- Coordinate project activities with the Contract Manager
- Coordinate project activities with the Consulting Manger
- Initiate the management escalation process for critical decisions.
- Develop, negotiate, and review project contracts

The Contract Manager has the following authority with regards to this project:

- Approve invoice payment in accordance to deliverable acceptance criteria
- Resolve operational issues in collaboration with the Project Lead and Consulting Manager
- Escalate issues to the Project Sponsors

The Contract Manager has the following responsibilities with regards to this project:

- Coordinates project activities with the Project Lead
- Coordinate project activities with the Project Sponsors
- Assure compliance with project plan and standards by the project team and vendor
- Present and report project status to PRB and various levels of management on a regular basis
- Develop, negotiate, and review project contracts
- Manage activities of the vendor in accordance with contract provisions
- Ensure resolution of operational issues
- Initiate the management escalation process for critical decisions (see below)
- Issues change orders to contract if needed

9.2 Consulting Manager

The Consulting Manager has the following authorities with regards to this project:

- Execute work plan and deliver project deliverables per contract agreement

The Consulting Manager has the following responsibilities with regards to this project:

- Develop achievable project plan to deliver successful results
- Develop work plans (tasks, schedule and resource allocation) for project
- Develop plans for project communications, reporting, risk management and quality management, and define project processes as provided for in the scope of work
- Build strong project team
- Manage and control day-to-day project activities, resources, issues, risks, quality, budget, and team

9.3 Resource Coordinator

- Negotiates resources to dedicate to the project (project lead and functional leads).

9.4 Functional Leads

Functional leads roles and responsibilities are:

- Provide expertise on current business operations model and business processes.
- Provide review of consultant industry best practice recommendations for feasibility and fatal flaws in the county environment.
- Coordinate involvement and participation of subject matter experts.

9.5 Subject Matter Experts

Each agency identified individuals responsible for providing that agency's specific business process and business model information for their financial, budget, human resource and payroll functions.

Subject matter experts' roles are:

- Provide expertise in functional components of each business area.

- Provide input and validate results of the business operations model project components.

Business Managers for the four business areas, along with SMEs, participate in providing and coordinating the business cost data collection, as well as a higher-level business expertise for input and review as necessary.

The subject matter experts coordinate for alternate resources, if necessary, to ensure their organization's participation.

9.6 Technology Leads

Each agency identified a single individual responsible for providing that agency's IT cost information. This person may, in turn, have to coordinate with other individuals in the agency to gather the necessary data.

The technology lead's responsibility is to serve as the agency focal point for collecting and validating the requested technology data and provide a follow-up information as necessary.

9.7 Project Sponsors

The Project Sponsors have the following authority with regards to this project:

- Provide leadership and advocacy for the project
- Direct Project Lead and Contract Manager in carrying out project management for this effort

The Project Sponsors have the following responsibilities with regards to this project:

- Provide rapid turnaround of decisions that are critical to project progress as defined in the following escalation management process.
- Provide review of draft project deliverables and provide feedback
- Review major work products at key milestones
- Monitor project status reports and communicate to Advisory Committee and county leadership on a regular basis
- Communicate support for the project to county stakeholders
- Mobilize project resources

9.8 Business Management Council and Technology Management Board

The Business Management Council (BMC) and Technology Management Board (TMB) are essential in ensuring a county-wide project participation by providing the business and technology expertise from their organizations to provide input to the project and review project deliverables.

9.9 Advisory Committee

The Advisory Committee has the following authority with regards to this project:

- In instances where the Advisory Committee Member is not in position to endorse and support the Advisory Committee or the Program's recommendation, action or decision, the Member has an authority to take an exception. The Member will submit to Project Sponsors, in writing, a rationale for their agency position with a clear description of business impact that particular item would impose to their agency or the county. The Project Sponsors will take an action, via Action Plan, as described in the "Issue Resolution within the Advisory Committee" in Section 9.11 of this document.

The Advisory Committee has the following responsibilities with regards to this project:

- Ensure that the perspectives and understanding of different stakeholders are factored into policy level discussions and decisions
- Provide advice and input on cross agency project roadblocks relating to policy issues
- Provide review of draft project deliverables and provide feedback
- Monitor project status reports and communicate to their leadership on a regular basis
- Help support a county-wide vision and goals for business process improvements as adopted in Vision and Goals statement.

9.10 QBC Escalation Management Process

When decisions about risks and issues of a critical nature threaten the project due date, quality, or support, the project management will initiate the escalation management process. The process involves the following steps:

Timeline	Responsibility	Step Activity
Day 1	Any team member	Critical problems identified.
Day 1	Project Team	Verify problem, quantify, and assess degree of threat to schedule.
Day 1	Project Team	Analyze problem, develop several possible solutions, determine time window when decision is required.
Day 2	Consulting Manager or Project Lead	Develop decision document that <ul style="list-style-type: none"> • summarizes the problem, • describes the desired end result, • describes 2 or more solutions, (with advantages and disadvantages of each) • summarizes the recommended solution.
Day 2	Contract Manager	Notify Project Sponsors that decision is required by a specific due date – distribute decision document.
Day 4	Project Sponsors	Determine method for reaching decision, decide & communicate. Or notify Advisory Committee that decision is required by a specific due date – distribute decision document.
Day 5 (by noon)	Contract Manager	If no decision by due date – communicate to team and Advisory Committee that the recommended (default) solution will be implemented so that the project may proceed.

*The timeline is expressed in Monday through Friday working days for the Advisory Committee.

9.11 Issue Resolution within Advisory Committee

Issues brought up by the Advisory Committee Members which cannot be promptly resolved, will be logged in the Program Issue Log, along with an Action Plan to be prepared by the Project Sponsors. The Action Plan will be discussed within the Committee, and agreed upon. Where issues cannot be resolved within the Advisory Committee, the Advisory Committee Member(s) have an option of requesting the Project Sponsors to present the issue to the Executive Sponsor for his consideration/resolution.

It will be the responsibility of the Project Sponsors to provide timely updates to the members regarding the status and/or resolution of issues. These updates will occur during scheduled Advisory Committee meetings or through Inter Office Memorandum.

It will be the responsibility of each member in the Advisory Committee to document and present an Issue Report to the Project Sponsors. The Issue Report should contain at a minimum the following:

- Description of the issue and desired outcome expected
- Business or financial impact if issue is not resolved accordingly

The Project Sponsors will review the issue submitted by the Advisory Committee member and determine a course of action to be taken (via an Action Plan).

10. Appendices

Appendix A: List of BMC and TMB Members

Appendix B: List of Subject Matter Experts and Technology Leads

Appendix C: List of Business Managers and SMEs for Business Cost Data

Appendix D: Project Support

Appendix E: Project Scope

Appendix F: Reference Materials

APPENDIX A: List of BMC and TMB Members

Agency	Business Management Council	BMC cc	Technology Management Board	TMB cc
	Chair: David Martinez, CIO		David Martinez, CIO	
Adult Detention	TBD	Tim Longley, Elizabeth Watkins	Tim Longley	
Assessor	Rich Medved		Hoang Nguyen	
Budget	Deborah Gay	Steve Call, Sheila Roehm	Jim Walsh	
Community & Human Services	Randy Inouye	Ellie McKinley	Teri Bednarski, Jean Dars	Randy Inouye, Barbara Solomon
Council	Paul Gaskill	Mike Alvine, David Randall	Paul Gaskill	Mike Alvine, David Randall
Development & Environmental Svcs	Michael Frawley		Larry Faucher	
District Court	Tricia Crozier		Cathy Grindle	
Executive		Rod Brandon, Calvin Hoggard		
Dept. of Executive Services	Caroline Whalen	John Anthony, Connie Griffith, Kevin Kearns, Rosa Orams, Ruben Rivera, Karleen Sakumoto, Paul Tanaka, Jim Buck	Kevin Kearns	John Anthony, Rita Howar, Marsha Knight, Samuel Cardenas
Judicial Administration	Teresa Bailey	Barbara Miner, Staci Henderson, Angelina Jimeno	Joe Shuster	Bill Bachmann, Peggy Ridgeway
Natural Resources	Gary Hocking	Cathy Ortiz, Kathleen Shannon	Gary Hocking	Nancy Bergstrom
Prosecuting Attorney	David Ryan	Marcine Anderson	Fred Flickinger	Marcine Anderson, David Ryan
Public Health	Kathy Uhlorn	Kristie, Sanchez	Patty Schwendeman	Brent Veenstra
Sheriff's Office	Pat Lee	Amelia Gonzales	Charlotte Dazell	
Superior Court	Paul Sherfey		Betty Hopper	
Transportation	Mary Peterson	Pam Abbey-Bowman, Rommel Buenafe	Greg Scharrer, Peggy Will	Charlene Sellhast, Rommel Buenafe
Office of Information & Resource Mgmt		Dick Arnston, Tilli Buchanan, Trever Esko, Kevin Fung, Sharon Glein, Amy Hughes, Jim Keller, Gary Lemenager, Lynn Mazer, Greg Padden, Dana Spencer, Evelyn Wise		Tilli Buchanan, Trever Esko, Sharon Glein, Jim Keller, Gary Lemenager, Dana Spencer, Evelyn Wise

APPENDIX B: List of Subject Matter Experts and Technology Leads**Subject Matter Experts**

Organization	Business Area	SME
Budget Office	Budget	Jim Walsh
	Budget	Helene Ellickson
	Budget	Jim Record
DAJD	HR	Kerry Delaney
	Payroll	David Pierce
	Financials	Pat Presson
	Financials	David Pierce
	Financials	Linda Ip
	Budget	Mike West
DCHS	HR	Irma Van Buskirk
	Payroll	Irma Van Buskirk
	Financials	Randy Inouye
	Budget	Randy Inouye
DDES	HR	Kathy Graves
	Payroll	Kathy Graves
	Financials	Dana Ritter
	Budget	Jim Schaber
DJA	HR	Joy Fernandes
	HR	Teresa Bailey
	Payroll	Joy Fernandes
	Financials	Joy Fernandes
	Budget	Teresa Bailey
	Technology	Joy Fernandes
DNRP/ WLRD	Payroll	Diane Schneider
	Financials	Diane Schneider
	Financials	John Allen
	Financials	Sheri Coen
	Budget	John Allen
	Technology	Jill Hall
DNRP/Parks	N/A	
DNRP/Solid Waste	Financials	Ken Wong
DNRP/WTD	Financials	Steve Tull
DOA	HR	Rich Medved
	HR	Joni Shirer
	Payroll	Gail Sjodin
	Financials	Rich Medved
	Budget	Rich Medved

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Organization	Business Area	SME
DOA (continued)	Technology	Rich Medved
	Technology	Shirer/Sjodin
DOT/Roads	HR	Melinda Dickie
	Payroll	Sharon Cooper
	Financials	Judy McKinley
	Budget	Greg Scharrer
	Budget	Jay Osborne (CIP)
DOT/Transit	HR	Lorraine Patterson
	HR	Jill Krecklow
	Financials	Lorraine Patterson
	Financials	Jill Krecklow
	Budget	Lorraine Patterson
	Budget	Jill Krecklow
DOT/Fleet		
DOT/Airport		
DES/FMD	HR	Carol Coghlan
	Payroll	Carolyn Mock
	Payroll	Victoria Leland
	Payroll	Carol Coghlan
	Financials	David Preugschat
	Financials	Kathy Murata-Smith
	Financials	Kathy Brown
	Financials	Jim Burt (CIP)
	Financials	Joyce Stahn
	Financials	Victoria Leland
	Financials	Kathy Murata-Smith
	Budget	David Preugschat (Op Budget)
	Budget	Jim Burt (CIP)
	Budget	David Preugschat
Budget	Carolyn Mock	
DES/FBOD	HR	Karla Starr
	HR	Lai-Ping Kimura
	HR	Lynn Constantine
	HR	Dan Hughes
	HR	James Clopton
	HR	Gail Morris
	HR	David Putnam
	HR	Sharon Thompson
	HR	Sharon Brown
	HR	Bruce Yeatts
	HR	Dorothy Kiest
	HR	Moneca Allen
	HR	David Putnam

Organization	Business Area	SME
DES/FBOD(continued)	HR	Kathleen Rost-Petersen
	Payroll	Cindy C-Wilson
	Payroll	Vijay Yegalapati
	Payroll	Vatsala Gopaul
	Financials	Eric Polzin with Loren Burt; Janet Zimmerman
	Financials	Linda Machno/Roy Dodman
	Financials	Mike Bacnis
	Financials	Connie Griffith/Pat Presson
	Financials	Lois Watt
	Financials	Don Robinson
	Financials	Connie Hughes
	Financials	Scott Matheson/Nigel Lewis
	Financials	George Olson
	Budget	Ken Guy/Phil Sanders
	Technology	Donna Layne, Tim Hansen
	Technology	Keith Kilimann (ITS)
	Technology	Manny Cristobal
	Technology	Vatsala Gopaul
	Technology	Joe Lovett
	Benefits Admin.	Cindy Lee
DES/HRD	HR	Kerry Schaefer, Ron Weigelt
	HR	Pamela Harding, Kerry Delaney
	HR	David Gooden, Wes Moore
	HR	David Gooden
	HR	Kerry Schaefer, Lorraine Patterson
	HR	Sherry Chaney, Kathy Coronetz
	HR	Maria Batayola, Wes Moore
	HR	Tim Drangsholt, Kerry Delaney
	HR	Sherry Chaney, Ron Weigelt
DES/ITS	HR	Christine Chou/Chris Ynzunza
	HR	Teresa Dent
	Payroll	Dory Isip
	Financials	Helen Harris
	Financials	Maria Masunaga
	Financials	Ana Ma-Lee
	Financials	Maria Masunaga
	Financials	Christine Chou
	Budget	Christine Chou
	Technology	Donna Lane, Ernie Jones, Tim Hansen,
	Technology	Larry Johnson, Brian Nguyen
	Technology	Ernie Jones
	Technology	Duc Nguyen, Norm Smith, Jeff Lai
	Technology	RDS: Marc Bermudez
DES/ORM	HR	Hanh Mai

Organization	Business Area	SME
DES/ORM (continued)	HR	Jennifer Nelson
	HR	Dan Fleming
	Payroll	Joan Fish
	Financials	Hanh Mai
	Financials	Joan Fish
	Budget	Hanh Mai
	Technology	Hanh Mai
DES/REALS	HR	Sean Bouffiou
	HR	Terry Denend
	Payroll	Sean Bouffiou
	Payroll	Terry Denend
	Financials	Sean Bouffiou
	Financials	Terry Denend
	Budget	Sean Bouffiou
KCC	HR	Dianne Caffiere
	HR	Ellen Petre
	Payroll	Dianne Caffiere
	Financials	Ellen Petre
	Financials	Frances Bobadilla
	Budget	Ellen Petre
	Technology	Paul Gaskill
KCDC	HR	Karen Tall
	Payroll	Donna Brunner
	Budget	Donna Brunner
	Technology	Cathy Grindle
KCSC	HR	Steve Davis
	HR	Minerva Villarreal
	HR	Teresa Martinez
	HR	Payroll Control
	HR	Gertrude Fuentes
	HR	Kathryn Schipper
	HR	Minerva Villarreal
	Payroll	Steve Davis
	Financials	Steve Davis
	Budget	Steve Davis
KCSO	HR	Marilyn Rhodes
	HR	Bill Wilson
	HR	Ralph Cady
	HR	Lisa Watson
	HR	Scott Sterland/Mike Pendrak
	Payroll	Marilyn Rhodes/Cynthia Wilson
	Financials	Marilyn Rhodes
Financials	Cheri Allan	

Organization	Business Area	SME
KCSO (continued)	Financials	Pat Raftis
	Budget	Bill Wilson
	Budget	Jason King
	Technology	Marilyn Rhodes
	Technology	Jason King
OIRM	HR	Dana Spencer
	Payroll	Dana Spencer
	Financials	Dana Spencer
	Budget	Dana Spencer
	Technology	Dana Spencer
PAO	HR	Becky Gifford
	HR	Heidi Parkington
	Payroll	Becky Gifford
	Payroll	Manh Nguyen
	Financials	Mark Buening
	Budget	Mark Buening
	Technology	Mark Buening
	Technology	Manh Nguyen
Public Health	HR	Ron Weigelt
	Payroll	Kathy Skrinski
	Financials	Melissa Patterson
	Financials	Marjory Mathews -Hellman
	Budget	Kathy Uhlom
	Technology	Kathy Uhlom

Technology Leads

Report No.	Agency - Separate Elected	Technology Lead
1	Assessments	Hoang Nguyen
2	Council	Paul Gaskil
3	District Court	Cathy Grindle
4	Prosecuting Attorney	David Ryan
5	Sheriff	Charlotte Dazell
6	Superior Court	Kevin Daggett/Betty Hopper
	Agency - Executive	
7	Budget Office	Jim Walsh
	Office of the Executive	Anne Brusklund via Pam Cole, Lorne McKay
	Business Relations and Economic Development	Anne Brusklund
	OIRM	Anne Brusklund via Dana Spencer
8	Adult and Juvenile Detention	Tim Longley
9	Community and Human Services	Randy Inouye/Aes Hilda
10	DDES	Michael Pahl
11	DJA (Judicial Administration)	Joe Shuster
12	DNRP	Gary Hocking
13, 14	DOH	Greg Scharrer
15	Public Health	Patty Schwendeman
16	DES/EBOD	Craig Soper
17	DES/HR	Samuel Cardenas
18	DES/ITS	John Anthony
19	DES/FMD	Dave Preugchat (Anne Brusklund)
	DES/REALS	Sean Bouffion (Anne Brusklund)
	CAO Administration	Anne Brusklund
	Office Of Risk Management	Anne Brusklund
	Office of Emergency Management	Anne Brusklund
	Office of Civil Rights	Anne Brusklund

APPENDIX C. Subject Matter Experts – Business Cost Data Providers

Business Cost Orientation
Key- Olympic, 2-3 pm
March 3, 2004

No	Agency - Separate Elected	Signan	Contact	Phone
1	Assessor		Rich Medved	296-5116
2	Council		Ellen Petre	
3	Prosecuting Attorney	Mark Buehning		296-9705
4	Superior Court		Linda K. Ridge	205-2582
5	District Court	Peggy Bednared		296-3596
6	Sheriff	Charlotte Dazell		205-7918
	Agency - Executive			
	Budget Office	Jim Walsh		296-3424
	Office of the Executive	Annie Brusklund		
	Business Relations and Economic Development	Anne Brusklund		
	QIRM	Gary Lemenager		263-4811
8	Community and Human Services	Randy Inouye		296-5208
9	Adult and Juvenile Detention		TBD	
10	Judicial Administration	Joy Fernandes		205-8324
11	Development and Environmental Services	Jim Schaber		296-6684
12	Public Health	Janine Weihe		296-4779
13	Natural Resource & Parks	John Bodla - Director Steve Oien - WL RD Greg Babinski - GIS		205-0943 296-8339 263-3753
14	Transportation	Greg Scharrer		296-8746
15	Roads and Transit			
	Executive Services			
	HRD	Pamela Harding - HRD		205-6280
	ITS		Craig Soper - FBOD	684-1078
16	FMD	Larry Wright - FMD		296-0652
17	REALS			
18	CAO			
19	ORM			
	OEM	Anne Brusklund		296-3814
	OCR			

APPENDIX D. Project Support

The project is supported by OIRM and DES/FBOD resources, as follows:

- Consultant space and logistics are provided by DES/FBOD.
- LAN Administration: Brian Bothomley, LAN Administrator, DES/FBOD
- Project Assistant: Lorrie Wood, OIRM
- Budget Administration: Craig Soper, DES/FBOD

APPENDIX E. Project Scope

The Project Scope document is available at: <http://kcweb/oirm/projects/qbc.htm>

APPENDIX F. Reference Material

- Vision and Goals Statement, April 18, 2003, available at <http://kcweb/oirm/projects/qbc.htm>
- Roadblocks Identification and Resolution Plan, available at: <http://kcweb/oirm/projects/qbc.htm>
- PIP Program Charter, available at: <http://financweb/payben/payben.htm>