King County

RMS Employee Interface

Project # 1116898

Benefit Realization Report

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Revision History

Version #	Revision Date	Revised by	Description
1.1	10/26/2010	Gary Tripp	Changed logo
1.2	4/15/2012	Karl Nygard	Updated and added detail

1.0 Value Received

Each IT project should have a value which will be realized by the department either during or after the project completes. This identifies the value received by implementing a project solution in a department or unit and compares it to the value projected by the Business Case and any supporting benefit worksheets, including:

- Financial value
- Quantifiable value to the county
- Quantifiable value to the public
- Value from non-quantifiable benefits

The primary goal of this document is to track the benefits of a project over time and be able to answer the question "Was this project successful and in what areas?" A secondary goal is to compare the ongoing realized benefits to those that were estimated at the beginning of the project, and for subsequent updates. This allows us to answer the question "How do the benefits realized relate to those used to justify the project?" These two questions are of paramount importance in the oversight and government of all projects.

1.1 Metric description and collection method:

Please list the metrics that you will use to define and track the success of this project from a benefits standpoint. If someone asks, "show me how this project was successful or not" these are the metrics which define success, and which should be reported on a regular basis. For each metric, please also state how they will be collected.

The metrics used to define and track the success of the RMS Employee Interface project are:

1. **85% of employee leave records generated are created by the employees using the interface developed.**
   A goal of the project is to achieve best practice regarding employees managing their own leave. This is achieved by allowing employees the ability to enter leave requests directly into a system that provides request validation and automated data collection and response.

   - RMS report will be developed to report on this metric. Report will provide percentage of total leave records generated by employee and percentage generated by another user of total leave records.

2. **Reduction in the number of leave record modification done by DAJD payroll clerks below 500 per month.**
   A goal of this project is to reduce the number of leave adjustments that must be made by DAJD payroll clerks and to increase efficiency of tracking of FMLA leave events. With employees entering their own leave, management of the type of leave used while under FMLA will be the responsibility of the employee.

   Also with access, all employees will be responsible for ensuring leave balance by type exist for leave that was schedule months earlier during annual leave processing.

   - RMS report will be developed to report on this metric. Report will provide total of leave records modified by DAJD payroll clerks during payroll process.

3. **85% of employee dream sheet records are generate by the employee using the interface developed.**
   A goal of this project is to transfer dream sheet preference record entry to the employee making the request. Rather than having the employee complete a form and then having data entered by someone else, the project provides an interface that permits the employee to entered request directly.

   - RMS report will be developed to report on this metric. Report will provide percentage of total preference records generated by employee and percentage generated by administrative staff.

4. **An increase in effective tracking of overtime availability and establishment of an efficient backfill process.**
   A goal of this project is to increase tracking of overtime availability and to aide supervisors in making overtime assignments. Tracking involves automating records of employees indicating availability to ensure labor rules are adhered to when making assignments. In making the assignment, the existence of availability data allows automated process of lists consistent with labor contracts and full visibility of overtime assignment management.

   - RMS report will be developed to report on this metric. Report will provide total of availability notices recorded by employees and the number of those assigned overtime to operational posts.

5. **Increase Tracking of employees on FMLA leave**
   A goal of this project is to increase FMLA tracking by capturing from an employee leave type and reason for specific FMLA events. The information is essential in meeting King County FMLA tracking requirements as supported by implementation of PeopleSoft functionality. DAJD is currently unable to address coding in a timely manner and tracking results in a case by case based within current pay cycles.
   - RMS report will be developed to report on this metric. Report will provide percentage of FMLA leave records entered by employee to total of FMLA leave records reported by DAJD payroll section.

1.2 Transition plan:

If the metric definition, collection method, and reporting are not determined by the business owner and recipient of the benefits above, please detail how the ongoing business owner will take ownership of the metrics, collection, tracking, and reporting of these benefits.

[Not applicable]

Department Director Signature: _____

1.3 Operational Efficiencies Benefit Measurements (as applicable)

Description	Metric	Baseline	Target	Actual	% Accomplished
Leave Records Entered by Employee	**1**	**0%**	**85%**		
Leave Modifications by Payroll Clerk	**2**	**1100**	**500**		
Dream Sheet Preferences Entered by Employee	**3**	**0%**	**85%**		
Tracking of Overtime Availability Notice	**4**	**0%**	**Yes Tracking Occurs**		
FMLA Tracking	**5**	**0%**	**75%**		

1.4 Annual Cost Savings Measurements (as applicable)

Description	Initial Projected Cost Savings/avoidance/revenue (from business case)	Updated Savings/ avoidance/ revenue	Actual Savings/ avoidance/ revenue	Explanation of Variance
Leave Records Entered by Employee (0.5 min/record-85% of est.)*	$24,455			
Leave Modifications by Payroll Clerk (2.0 min/record-85% of est.)*	$28,160			
Dream Sheet Preferences Entered by Employee (1.0 min/record-85% of est.)*	$ 1,000			
Overtime Availability Notice	Not Estimated			
FMLA Tracking	Not Estimated			

*All $ are based on record numbers. The records are generated by users of RMS of which there are currently over 200 users. Time spent on these transactions by supervisors and payroll clerks would be assigned to a higher valued task.

1.5 Other Benefits:

Please detail any significant benefits of the project that departments, customers, or others will receive beyond any cost savings or efficiencies (which should be detailed above). This could include benefits of risk reduction (please note how, why, and by how much), cost avoidance, or other areas of benefit not easily distilled to a single monetary value.

The most significant benefit of the project is the empowerment of employees to manage their own requests. In managing the activities listed below, the employee must address the constraints associate with their leave balances, type of leave available, correct communication of assignment preferences and their current availability status for overtime.

- Leave and use within leave bank limit
- Leave type changes,
- Dream sheet and transfer preferences
- Records of their availability to work overtime

Specific to leave record entry, the interface is essential to DAJD meeting FMLA reporting requirements as currently defined as accurate leave type and reason code reporting. The expectation that leave use be reported in PeopleSoft using specific leave and reason codes make it imperative that leave be entered by the employee. There are approximately 120 employees each pay cycle requiring FMLA reporting detail.

DAJD operational business needs are not met by leave entry directly into to PeopleSoft timesheets. The leave information impacts assignment schedules and assignment backfill needs of operational sections. Most effective and efficient flow of information is derived from leave entered directly into a scheduling system that interfaces with a payroll process. In addition most of DAJD payroll information is derived from RMS to include, work hours and schedules, overtime rate determinations, cost assignment based on employee assignment, holiday accruals among others.