



2023-2024 Master Plan Project Sizing Workshop Agenda

You are not required to login for this workshop.

- Why Project Sizing
- Master Planning Timeline
- Project Sizing Process
- Project Sizing Reminders
- Portlet Review
- Summary & Questions

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2023-2024 Master Plan Project Sizing

Why Project Sizing

- Purpose
- Early Stages of Project Planning
- Provide a “high level” Estimate in Clarity / OWB
- Scope & Approach and ROI
- Tracking Time for Project Sizing

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2023-2024 Master Plan Project Sizing Master Planning Timeline

- January 2022 – March 8, 2022
 - Project Sponsor establishes Business Case for Project including preliminary Scope & Approach and ROI
- March 22, 2022 – Courts, Finance/Admin & Land LG
 - Project Sponsor presents Business Case for Project to Leadership Group
 - Leadership Group Approves or Denies Project for Sizing
- April 4 – 25, 2022 – TSN, eGov, IS and CLEMIS
 - Project Sponsor presents Business Case for Project to IT Steering Committee

2023-2024 Master Plan Project Sizing Master Planning Timeline - Continued

- March 23, 2022 – June 10, 2022

Project Manager

- Develops Project Size Estimate in Clarity
- Refines Scope & Approach
- Completes ROI
- Meets with TSN for Estimates – May 9th and 10th
 - Identify all Tech hours you will need for next 2 years
 - Including PM&U hours
- TSN meets with IT for Estimates – May 12th
 - Identify all App Services, Internal Services, and CLEMIS hours needed for TSN, Security, and EA projects
- Sends PMO an email for Sizing Review – submit by **June 10, 2022**

2023-2024 Master Plan Project Sizing Master Planning Timeline - Continued

- July 26, 2022 – Courts, Finance/Admin & Land LG
 - IT Supervisor/PM and Project Sponsor present Sized Project to Leadership Group
 - Leadership Group approves and prioritizes Sized Projects
- August 9 - 31, 2022 – TSN, eGov, IS and CLEMIS
 - IT Supervisor/PM and Project Sponsor present Sized Project to IT Steering Committee
- September 2022 – October 2022
 - Project Manager autoschedules Approved Sized Project based on Leadership Group priority.
- October 25, 2022
 - Leadership Group Reviews and Approves 2023-2024 Master Plan Projects

2023-2024 Master Plan Project Sizing Project Sizing Process

- Project Sizing Documentation
 - Appendix K – Leadership Group Initiation & Project Sizing Checklist
 - PM Handbook Section 11
 - Scope and Approach Instructions
 - Information Technology Leadership Groups Processes and Procedures
 - Appendix H – Customer Codes – Codes have changed.
 - ROI Instructions

2023-2024 Master Plan Project Sizing Project Sizing Process - Continued

- Supervisors will add Project Name, ID, Resource, ETC and Charge code to Sizing Budget task for time tracking (step 7)
- Create a Sizing Project in Clarity (step 8 and 9)
 - New From Template
 - General Link
 - Schedule Link - Enter Charge Code, Project Sponsor and uncheck Time Entry
 - Environmental Risk Link – enter from Scope & Approach
 - IT Strategies & Initiatives Link – Check strategies that align w/project
 - Financial Link – Cost Source defaults to Currency in Hours

2023-2024 Master Plan Project Sizing

Project Sizing Process - Continued

- Assign Generic Roles to Project (step 10)
 - Clarity Team Tab
 - Put thought into all Roles needed for this project
 - Who do you need for Initial Planning? Any Tech resources? Will your Supervisor or Chief need to review?
 - Default Allocation % = 25% or less
 - Assign Team OBS. May need to add the same Role multiple times for different OBSs
 - Scope and Contingency should be assigned to the Team OBS for the team that owns the project
- Assign ETC to Roles (step 11 and 12)
 - Clarity Workbench Views – Size Estimates
 - Multiple Roles will show as PG-1, PG-2, etc. Use Team OBS field to identify. Assign separate ETC for each
 - Autoschedule from 10/1/22 or anticipated start date

2023-2024 Master Plan Project Sizing Project Sizing Process - Continued

- Update Scope & Approach (step 13)
 - Insert Size Estimate – (+/- 10% to 50%) view
- Update ROI – review the ROI in detail (step 13)
- *Do not Submit to PMO yet....*

2023-2024 Master Plan Project Sizing Project Sizing Reminders

- Meet with TSN to review Tech Role Estimates
 - Meetings planned for May 9th and 10th
 - Track time for the meetings to the task TSN Size Estimate Meeting in your Sizing Budget.
- TSN meets with all other Divisions to review Role Estimates
 - Meeting planned for May 12th
 - Track time for the meetings to task TSN Size Estimate Meeting in your Sizing Budget.
- Update ETC, Scope & Approach and ROI as needed. Attach to Project in Clarity
- Submit Project Sizings to PMO by **6/10/22 or Earlier!**





2023-2024 Master Plan Project Sizing Cross Division Sizing Meetings

Monday, May 9, 2022

9:00am – Courts

10:00am – HR/Finance

1:30pm – AAT

2:30pm – PES

3:30pm - IGIS

Tuesday, May 10, 2022

9:00am - eCommerce

10:00am - eGovernment

11:00am - Internal Services

1:30pm - CLEMIS

Thursday, May 12, 2022

1:30pm – TSN presents to ALL

Please check with you Supervisor if you should attend any of the meetings.

2023-2024 Master Plan Project Sizing Portlet Review

- Rollover Projects Portlet
 - Executive Reporting/Project Allocation
 - Team Plans should never roll over.
 - Validate ETC and End Date for all detailed projects
- Weekly report to IT Steering Committee beginning 4/20/22



2023-2024 Master Plan Project Sizing Questions

Time Tracking for this Workshop

- FTE – Training Task
- Contractors – Project(s) in Sizing Budget (may need to spread time over multiple projects).

Additional Questions?



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