

Project Closeout Report

Submitted to Project Oversight on 11/30/2022

GENERAL INFORMATION

Project Name: Statewide Budget System

Agency Name: Office of Management and Budget

Project Sponsor: Stephanie Gullickson

Project Manager: Jacob Chaput

PROJECT DESCRIPTION

The Office of Management and Budget (OMB) Budget Office seeks to enhance its budgeting and reporting processes with a system that meets current and upcoming business needs. In March 2020, the project was initiated to procure a system that would meet these needs. In October 2020, Sherpa was the chosen vendor for their Budget Formulation and Management (BFM) Software as a Service (SaaS) tool. During the 2021 Legislative Session, the project was funded for the 2021-2022 biennium. On July 12th, 2021 the project was kicked off with chosen vendor Sherpa.

SCHEDULE AND COST METRICS

	Project Start Date	Baseline End Date	Baseline Budget	Funding Source	Actual Finish Date	Schedule Variance	Actual Cost	Cost Variance
Original Baseline	3/6/2020	8/18/2022	\$1,289,604	State	11/28/2022	12% Over	\$1,274,979	1% Under

Notes:

Development of executive and detailed budget books required additional time to ensure accuracy and readability.

MAJOR SCOPE CHANGES

None.

OBJECTIVES

Business Objective	Measurement Description	Met/ Not Met	Measurement Outcome
Increase staff efficiency due to more accurate importing.	Reduce manual entries by up to 50% during budget publication time.	Met	System brings numbers in automatically during budget publications.
Decrease training and questions for end users.	Once users are trained on the new system, they will be surveyed on if they found the system intuitive to use and if they needed follow-up training on the same topics. Success will be a majority of survey respondents finding the system intuitive and less than 25% requiring follow-up training.	Met	Agency end users reported high satisfaction with the new system with very low follow-up trainings needed.

KEY LESSONS LEARNED AND SUCCESS STORIES

A lessons learned effort is performed after the project is completed. This process uses surveys and meetings to determine what happened in the project and identifies actions for improvement going forward. Typical findings include, "What did we do well?" and "What didn't go well and how can we fix it the next time?"

Key Lessons Learned and Success Stories

As the State team learned more about the product there were requests to go back and redesign some forms. An iterative schedule of project activities with retrospectives may have reduced rework.

State team contributed immensely by being accessible and responsive, taking ownership of the system quickly. Having frequent internal meetings to keep the team up to speed and synchronized was critical for a short project timeline to meet the State's business cycle.

Poor issue tracking and user acceptance testing led to some issues being lost or unidentified before Go Live. Developing a comprehensive testing management plan during development would have provided more structure to the testing process.

The new system was successful in streamlining processes and allowing business processes to stay intact versus changing to work with a new system. The new system has allowed agency staff to spend less time inputting data needed for the budget building process and retraining.