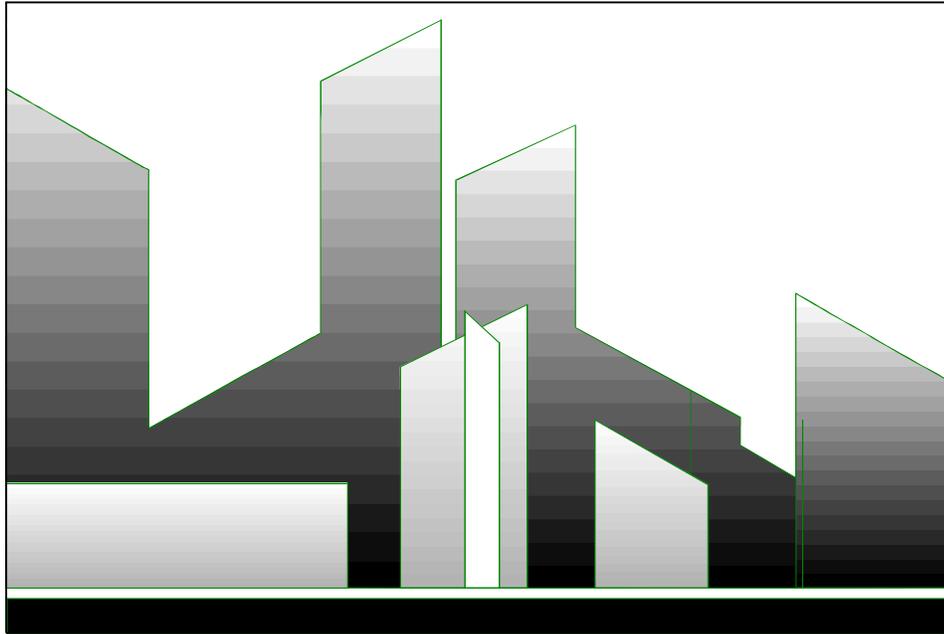


# Information Technology Strategic Plan

March 9, 2004



Real Estate Services Division  
**STRATEGIC PLAN**  
**FY 2003-2004**

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# **INFORMATION TECHNOLOGY (IT) STRATEGIC PLAN**

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# INFORMATION TECHNOLOGY (IT)

## USE ELECTRONIC PROCESSES TO FULFILL OUR CUSTOMERS' FACILITY AND REAL PROPERTY NEEDS

### INFORMATION Technology Vision:

**RESD meets its information needs and the information needs of its branches and customers with reliable, integrated systems that deliver accurate data for business functions and decisions.**

**Purposes:** Information Technology is both a **method** for conducting many RESD business functions and (increasingly) an essential **capability** of modern business organizations.

**A METHOD OR MEANS** Information Technology serves as a “**means**” by which RESD accomplishes the substantive mission, goals and objectives shown in the Division’s Strategic Plan. For this reason, it would seem logical to plan and evaluate the IT program by its **utility**:

- ◆ How does IT help RESD fulfill its mission, and
- ◆ How does IT assist RESD staff pursue the Strategic Plan objectives?

**AN ASSET** Information Technology is an inherently desirable asset, permitting an organization to keep pace with modern, automated business practices, regardless of immediate bottom-line effects. From this perspective RESD can plan and evaluate IT efforts by:

- ◆ Effectively managing its considerable IT investment, and
- ◆ Comparing RESD capabilities to industry “best practices.”

## **Strategic Plan Relevance**

On the following pages we have integrated IT-specific strategies into RESD's overall Strategic Plan, adding to business objectives that require an IT capability or directly affect IT operations and practices. We assume that RESD will use Information Technology to:

- ◆ Reduce the **time** required to perform RESD functions
- ◆ Decrease the **costs** of performing RESD functions, and
- ◆ Increase product **accuracy, quality and responsiveness**.

## **IT Strategic Plan**

In the final section of this report (beginning on page 17) we use the IT materials provided by Division managers to build an IT- specific plan.

***Fit with  
Goal/Objective  
Structure*** This IT Strategic Plan will govern the development of the Division's electronic infrastructure to assure the timeliness and quality of RESD services, and reduce the frequency of customer complaints.

## GOAL I: THRILL OUR CUSTOMERS

The Real Estate Service Division's Mission highlights:

**"...FULFILLING OUR CUSTOMERS' FACILITY AND REAL PROPERTY NEEDS."**

Our primary goal should reflect the emphasis on customers. The following six objectives and strategies provide an agenda to maintain our customer focus.

### Objective I-1: **Connect With Our Customers.** [Improve communications with our customers.]

#### IT Strategies

- ◆ Implement **on-line service requests** (*CRUISE*),
- ◆ Continue the commitment to bring the **CRUISE** customer service system into production.
- ◆ Continue to explore **E-government solutions** that would provide an increasingly higher standard of customer service to RESD clients and the public.
- ◆ Establish and use consistent **definitions** for service type, service units, service agreements and RESD reporting.

**Performance Measurement Methods:** *Customer Interviews, Number of CRUISE on-line requests*

### Objective I-2: **Keep Your Promises to Meet Project Commitments**

#### IT Strategies

- ◆ Investigate the **feasibility of automating** the Facility Performance Evaluation (FPE) process
- ◆ If feasible, **automate the process:**
  - Identify the major decision-making data elements in a FPE
  - Design a form (preferably electronic) for entering/collecting FPE data
  - Design a method for analyzing and reporting FPE
  - Design a format and method for delivering electronic FPE data to RESD users and customers
- ◆ **Integrate** FPE data into the overall RESD data set

**Performance Measurement Methods:** *Customer Interviews, Commissioning Reports and Facility Performance Evaluation (FPE)*

**Objective I-3: Find Out What Our Customers Want and Deliver it**  
[Increase the number/percentage of projects completed within the authorized scope.]

**IT Strategies**

- ◆ Develop an IT Communications and Change Management Plan that clearly defines how RESD will communicate information about IT projects and initiatives to its various stakeholders.
- ◆ Implement a proof-of-concept Business Intelligence System that provides a web-based, cross-system view of information for strategic decisions.
- ◆ Continue to explore E-government solutions that would provide an increasingly higher standard of customer service to RESD clients and the public.

**Performance Measurement Methods::** *Scopes completed; develop methods to measure performance based upon project scope provisions and documented project progress*

**Objective I-4: Find out and improve what our customers think of us.**

**IT Strategies:**

- ◆ Use the web-tracker to record and confirm website changes, and to measure website usage.
- ◆ Continue improvements to the automated RESD customer survey
- ◆ Continue the commitment to providing client agencies with state buildings information by completing the process of creating and maintaining Web sites for each building. Approximately 11 of 33 building sites have been completed.

**Performance Measurement Methods::** *Customer Surveys and Web-tracker*

**Objective I-5: Deliver What Our Customers Want When They Want It.**  
[Complete projects on schedule.]

**IT Strategies**

- ◆ Disseminate (or make available on line) the definitions, criteria, format and content, communication strategy(ies) and documentation on the consolidated RESD data base
- ◆ Develop automated reports to be written from the data base using the workload matrix.

**Performance Measurement Methods:**

*Annual Variance Reports for Major Capitol Projects*  
*Workload Matrix*

**Objective I-6: Deliver the Most Bang for the Buck. [Complete projects within budget.]**

**IT Strategies**

Monitor IT Projects:

- ◆ Enter, store and access real time cost-accounting data
- ◆ Track staff time consistently, using consistent project numbering
- ◆ Generate real-time expenditures by project number
- ◆ Compare expenditures with budget data

**Performance Measurement Methods:**

*Develop tools/metric devices for performance measurement based on verifiable data*

## GOAL II: GET AND KEEP GREAT PEOPLE

Customer satisfaction depends on our workforce. Knowledgeable, personable, and satisfied employees produce satisfied customers. To this end we will hire, develop, and retain excellent staff.

### Objective II-1: Recruit and Retain Talented People

#### IT Strategies

- ◆ Consolidate and share Division-wide personnel data
- ◆ Improve and use RESD internet sites to advertise and recruit for available positions
- ◆ Negotiate with OTR to assure availability for RESD emergencies

**Performance Measurement Methods::** *Vacancy rates; elapsed time from position authorization to hire*

**Objective II-3: Celebrate Great Work**

**[Acknowledge superior performance.]**

**IT Strategies:** To build and maintain employee aspirations and achievement we will:

- ◆ Evaluate existing **recognition programs** (Such as DGS Gold & Silver Awards)
- ◆ Actively **seek opportunities to recognize** superior individual and team performance,
- ◆ **Advertise and honor** our successes by:
  - Regularly distributing announcements of RESD staff accomplishments electronically (web site postings and/or e-mail)
  - Developing methods of communicating successes to target audiences—customers, DGS Executive Office, Governor’s Office Secretary of State and Consumer Services, the Legislature
  - Incorporating these materials into the DGS Marketing Program

**Performance Measurement Methods:**

*Trends in frequency and proportion of employee awards; notices and awards from professional associations; articles in the professional journals; positive stories and articles in the news media*

**Objective II-4: Provide great tools for great people**

**[Assure that we have the resources and training to provide excellent products and services.]**

**IT Strategies:**

To assure that our employees have the physical (space, facility and equipment) resources and the knowledge and skills to stay ahead of emerging trends, we will:

- ◆ Develop and implement a RESD **facilities/equipment plan**
  - **Survey and evaluate** RESD workplaces and facilities
  - **Inventory and evaluate** equipment (particularly IT equipment)
  - **Identify needs** for facility and equipment changes every three years, pursuant to industry life-cycle estimates; identify upgrades and replacements with estimated **costs**
- ◆ Develop and implement a RESD **Training and Development Plan**, including:
  - A training **needs assessment**,
  - A training **budget**,
  - Coordination with RESD University.

**Performance Measurement Methods:**

***A completed facilities and equipment Plan and a Training and Development Plan with provisions for regular updates***

## **GOAL III: PROVIDE EXCELLENT PRODUCTS AND SERVICES**

Everything we propose in this plan improves our products and services. In this section we emphasize the objectives and strategies that most directly affect our pursuit of excellence. (Objectives III-1, III-2, and III-6 below are also found in the discussion under **Goal I: Thrill Our Customers.**)

**Objective III-1: Find Out What Our Customers Want and Deliver it  
(Same as Objective I-3)**

Our customers are the ultimate judges of product and service excellence.

**Objective III-2: Keep Your Promises to Meet Project Commitments  
(Same as Objective I-1)**

Excellent products and services must comply with stated project goals and commitments. If anything goes wrong, communicate quickly!

### Objective III-3: Plan Ahead

[Develop Management Plans for all major service areas.]

**IT Strategies:** **Develop an IT Communications and Change Management Plan** that clearly defines how RESD will communicate information about IT projects and initiatives to its various stakeholders.

A recent consultant's report recommended the following advantages of a formal communications strategy<sup>1</sup>. Accurately broadcasting the right message, to the correct audience, at the right time, is a critical element to the success of new technology.

“... the ingredients of a communications strategy include much more than issuing information and responding to inquiries and complaints. The BIO group, in its technology governance role for RESD, can provide an excellent communication vehicle...”

A formalized communication plan can assist RESD in achieving the following objectives:

- ◆ Build an awareness of existing and planned technology in RESD
- ◆ Influence business strategy to leverage technology
- ◆ Initiate a workforce transition process to prepare for new systems/technology coming online
- ◆ Identify and demonstrate the alignment between technology and RESD business
- ◆ Highlight contributions of technology to the business
- ◆ Establish effective coordination and alignment with RESD technology goals, objectives and policies
- ◆ Improve perceptions regarding the usefulness and value of new systems

**Performance Measurement Methods:** *Develop tools/metric devices for performance measurement based upon data derived from planning activities*

<sup>1</sup> VIP Group (Visionary Integration Professionals, Inc.) report, Information Technology (IT) Infrastructure, Integration & Investment Requirements Study, Gap Analysis, and Activity Analysis, Desired State Report, FINAL, July 3, 2003

**Objective III-4: Make data easy to get. [Provide seamless access to data.]**

- IT Strategies:** To assure that we have the right information for vital program decisions and can document our performance, we will pursue the work listed in the IT-Specific Plan on page 20: **“CONSOLIDATE IT SYSTEMS AND PROCESSES.”**
- ◆ Develop and implement a RESD **corporate data base**
  - ◆ **Evaluate** existing data systems.
  - ◆ **Eliminate** redundancies.
  - ◆ Provide **access** as required.
  - ◆ Consolidate duplicate and complementary systems to reduce complexity, including:
    1. Integrate SIS (Structure Information System) data with the SPI (Statewide Property Inventory) data
    2. Minimize the use of various standalone systems and migrate, as appropriate, to the RESD corporate database
    3. Consolidate PSB workload systems into the Project Reporting and Workload Matrix (PRW Matrix) system

**Performance Measurement Methods:** *Develop measurement methods and tools.*

**Objective III-5: Deliver What Our Customers Want When They Want It  
(Same as Objective I-5)**

Excellent products and services depend on timely delivery.

**Objective III-6: Make Our Buildings Look Right, Feel Right, Work Right, and Endure  
[Implement Excellence in Public Buildings Initiative Recommendations – Plan, design, construct, operate and manage buildings that are energy efficient and incorporate cost-effective, proven sustainable building measures.]**

- IT Strategies:**
- ◆ Purchase IT equipment with energy conservation features
  - ◆ Improve the integration of building management and monitoring systems operated by the Building and Property Management Branch—HVAC, irrigation management and other systems

**Performance Measurement Methods:** *Projects completed that comply with “sustainability” and “excellence” guidelines.*

### Objective III-7: Develop and Implement a RESD Marketing Plan

**IT Strategies:** In the Marketing Plan, emphasize RESD IT capabilities, including the proof-of-concept Business Intelligence System that provides a web-based, cross-system view of decision-making information. This and other innovations will permit project managers and customers to:

- ◆ Track project progress in real time
- ◆ Keep data on RESD website current
- ◆ Communicate immediately with customers
- ◆ Identify and correct emerging problems and prevent delays

**Performance Measurement Methods:** *Customer surveys; number of requests for service.*

### Objective III-9: Do Things Right the First Time [Reduce/Eliminate rework]

**IT Strategies:**

- ◆ Complete the development of a Project Knowledge Database that will catalog specific problems that have occurred during the life of a project, and document how that problem was resolved.
- ◆ Develop an online E-Learning System.

**Performance Measurement Methods:** *Frequency, cost, and rates of required re-work.*

**Objective III-10: Do the right thing the right way.**

**[Eliminate Unnecessary Processes and Work.]**

**IT Strategies:**

To assure that IT operations reflect and support Division efficiency measures, we will:

- ◆ Develop a RESD data model that builds a corporate view of RESD's business data and promotes RESD's ability to support functional and data collaboration throughout the Division.
- ◆ Initiate an IT project review and approval process that increases the awareness of IT initiatives in the Division, establishes appropriate project standards, and promotes consistency in the approach to delivering IT projects.
- ◆ Develop formal data entry procedures that define the roles and responsibilities necessary to effectively maintain data in RESD systems.
- ◆ Consolidate duplicate and complementary systems to reduce complexity

**Performance Measurement Methods:** *Time, dollars saved due to processes eliminated*

## GOAL IV: BE RESPONSIBLE -- ETHICALLY, LEGALLY, AND FISCALLY

Pleasing our customers is just good business. In addition, the Legislature and the Governor rely on us to enforce laws governing State property, its upkeep, and management. In serving our customers we often must strike a delicate balance between customer demands and legal responsibilities. Making public interest a formal goal highlights the broader value of our accomplishments.

### Objective IV-1: Find Out What Our Customers Want and Deliver it

(Also Objectives I-3 and III-3)

We will provide what our customer agencies need so they are better able to serve the public.

### Objective IV-2: Deliver What Our Customers Want When They Want It

(Also Objectives I-5 and III-6)

On-time delivery will allow customer agencies to provide timely public service.

### Objective IV-3: Meet Our Financial Goals

[Meet or exceed goals contained in the Annual Financial Plan]

**IT Strategies:** To assure that we live within our means, we will:

- ◆ Obtain **accurate and timely financial reports**, including monthly Income and Expense statements, and
- ◆ Adjust our operations and expenditures to stay within the plan.

**Performance Measurement Methods:** **Annual Financial Reports**

**Objective IV-4: Stay out of trouble**  
**[Reduce adverse legal actions.]**

- IT Strategies::** To prevent claims resulting from RESD activities and proactively manage such claims, we will:
- ◆ Implement a pro-active claims management program (similar to the Office of Risk and Insurance Management vehicle insurance program),
  - ◆ Improve quality of documents,
  - ◆ Pre-qualify contractors,
  - ◆ Similarly address legal actions in other areas, such as Personnel, and
  - ◆ Track claims and settlements, including workers' compensation claims.

**Performance Measurement Methods:** *Number and rates of claims filed and dollars paid*

**Objective IV-5: Deliver the most bang for the buck.**  
**(Also Objectives I-6 and III-2)**  
Stakeholders, the Legislature and the public deserve fiscal responsibility.

**Objective IV-6: Find Out What Our Stakeholders Think**

- IT Strategies:** To continue providing excellent services and products to satisfied customers, we will:
- ◆ **Identify** our stakeholders of RESD IT services and meet with them
  - ◆ Develop a **stakeholder survey document** and procedure,
  - ◆ Conduct and **annual** stakeholder survey,
  - ◆ Analyze and review the results, and
  - ◆ Develop and implement a plan for improving stakeholder satisfaction.

**Performance Measurement Methods:** *Stakeholder survey results*

**Objective IV-7: Align the law to reflect best business practices.**

**IT Strategies:**

1. Many of the statutory requirements that govern our operations were enacted many years ago and do not accurately reflect today's use of information technology equipment and software. To establish a legal basis for pursuing "best practices, we will:
  - ◆ Form teams to **identify needed provisions,**
  - ◆ Identify and document **statutory and administrative obstacles** to using recognized industry best practices,
  - ◆ Develop **recommendations,** and
  - ◆ Work with the Office of Legislation to **draft proposed language.**

**Performance Measurement Methods:**

*Proposed legislation; bills signed and chaptered.*

**Objective IV-8: Do the right thing the right way  
(Same as Objective III-10)**

Stakeholders, the Legislature, the public and our customers should be assured that we are removing unnecessary procedures, streamlining our work processes and eliminating red tape.

## IT-SPECIFIC PLAN

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### **Purposes**

The Real Estate Services Division uses information technology (IT) to increase the speed, accuracy and reliability of data used to:

- ◆ Perform the work required in each RESD branch,
- ◆ Track the progress of the Division's many projects,
- ◆ Monitor Division expenditures, and
- ◆ Make management decisions concerning the allocation of all the Division's resources.

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### **Evaluation**

Because IT is a **means** of obtaining the Division's four strategic goals and associated objectives, the ultimate success of IT operations should be reflected in achieving these goals and objectives. But at the same time, we must consider operational objectives and strategies for implementing IT services and solutions.

**IT OBJECTIVE 1: PROMOTE e-GOVERNMENT** – Improving and expanding RESD’s presence on the Internet and Intranet will “Thrill our Customers” (Strategic Plan Goal #1) and increase customer satisfaction both internally and externally.

**Strategies:**

- Provide the public with RESD’s public domain information
- Continue the commitment to providing client agencies with state building information by completing the process of creating and maintaining web sites for each building.
- Convert static web pages to interactive pages
- Continue to add new reports and enhance ease-of-use features for online report Requests for RESD Internal Clients
- Develop an internet web site for online Real Property Transactions and Annual Verification for External Clients
- Develop an online e-Learning System.
- Continue to explore e-Government solutions that would provide an increasingly higher standard of customer service to RESD clients and the public

**IT OBJECTIVE 2: MAINTAIN IT INFRASTRUCTURE** – Maintaining a viable infrastructure supporting our information technology will help us “Get and Keep Great People” (Strategic Plan Goal #2)

**Strategies:**

- Provide RESD OIO, and thus the Branches, with the most up-to-date technology specifications for both hardware and software that best suit RESD’s business operations
- Continue to replace obsolete servers, PCs, laptops, and desktop software to enable RESD to achieve its business objectives
- Provide improved access and performance for remote users to DGS network.

**IT OBJECTIVE 3: ESTABLISH A CORPORATE DATABASE** – Leveraging ABMS, SPI, and Maximo will help us “Provide Excellent Products and Services” (Strategic Plan Goal #3)

**Strategies:**

- Develop an IT Strategic Plan that documents a clear, cohesive direction for technology in RESD, sets goals that achieve tangible results, and sets priorities for the utilization of limited IT resources
- Develop an IT Communications and Change Management Plan that clearly defines how RESD will communicate information about IT projects and initiatives to its various stakeholders
- Develop a RESD data model that builds a corporate view of RESD’s business data and promotes RESD’s ability to support functional and data collaboration throughout the Division
- Continue the RESD Corporate Database initiative by implementing recommendations resulting from the Corporate Database Study conducted in 2003
- Develop formal data entry procedures that define the roles and responsibilities necessary to effectively maintain data in RESD systems

- Complete the expansion of the ABMS Projects Module to include all branches
- Continue the commitment to bringing CRUISE customer service system into full production
- Initiate an IT project review and approval process that increases the awareness of IT initiatives in the Division, establishes appropriate project standards, and promotes consistency in the approach to delivering IT projects
- Expand the use of the Maximo Facilities Management System to take further advantage of its functionality and to eliminate duplicative facilities management/services related systems
- Implement a proof-of-concept Business Intelligence System that provides a web-based, cross-system view of decision-making information
- Modify the scanning process from as-built drawings to include indexing by the SPI and ABMS numbering systems; index previously scanned drawings
- Develop business needs assessment for a “virtual: plan room
- Develop Facilities and Buildings Management System; a detailed management analysis of business operations and a detailed needs assessment for a facilities and buildings management system
- Continue to restore the online query of real property, structure and lease information for the RESD real estate officers to a reasonable service level
- Improve the quality and integrity of SPI data, including improved data entry procedures
- Complete the development of a Project Knowledge Database that will catalog specific problems that have occurred during the life of a project, and document how that problem was resolved
- Develop and Implement a Estimating Database in compliance with the Bureau of State Audits 2002 Report
- Enhance electronic information exchange with clients and control agencies.

**OBJECTIVE #4: DATABASE CONSOLIDATION** – Combining duplicative and complementary data systems will help us “Be Responsible – Ethically, Fiscally & Legally” (Strategic Plan Goal #4)

**Strategies:**

- Consolidate duplicate and complementary systems to reduce complexity, including:
  - Integrate SIS (Structure Information System) data with the SPI (Statewide Property Inventory) data
  - Minimize the use of various standalone systems and migrate, as appropriate, to the RESD corporate database
  - Consolidate PSB workload systems into the Project Reporting and Workload Matrix (PRW) system

Consolidate the various Contracts Tracking Databases.

# Appendix