

Attachment 1 – ISMP Applications Projects Detail

ID	Project	Status	Completion Date
A3	Implement cross platform methods for emergency and other customer communications	Evaluation	Jun 2018
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> • Implement a mechanism for mass client communication during emergencies • Leverage SCVWD's existing GIS and client databases to automate client notifications and alerts • Integrate multiple communications platforms, including social media <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> • Increased public safety through timely notification of emergencies and potential risks • Enhanced client service by providing timely, targeted communications • Reduced volume of client inquiries and requests • Reduced reliance on manual processes <p><u>Progress:</u> This project requires collaboration between EOC, Communications, and IT, as well as clear business requirements regarding the communication plans and intended target audience.</p> <p><u>Next Steps:</u> Obtain clarity on project ownership and stakeholders from executive management, and begin gathering requirements.</p>		

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ID	Project	Status	Completion Date
A4	Upgrade PeopleSoft	In Progress	Dec 2018
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> Fully automate the District's financial and human resources management functions Automate and improve the accuracy of the District's planning and budgeting process Automate the tracking and reporting of the District's labor effort and employee leave Automatically apply SCVWD's business rules to employee time records Implement work flow for time approval, purchasing, and contract management Improve the accuracy of the allocation of time to projects, work orders, and other district activities Integrate with SCVWD's CMMS for asset and project accounting and, potentially, purchasing and inventory management Decommission ancillary and shadow systems whose functionality can be subsumed by the ERP Obviate the need for third party budgeting and planning and procurement solutions Automate and improve the accuracy of the District's contracting and contract management processes Leverage a modern, robust, supported and current solution Re-engineer related business processes, adhering to best practices Train users to sufficient competency in the software to ensure that its capabilities are effectively utilized <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> More accurate financial tracking and reporting Better insight into key financial data with real-time information More streamlined benefits administration processes (e.g., open enrollment, changes and updates) More accurate tracking and reporting of employee time, leave balances, benefit accruals, etc. Accurate labor cost and effort data for projects, work orders, and other district activities Accurate, timely management information including project and work order cost data Enhanced employee and process efficiency via automated workflow More accurate contract management and administration More accurate planning and budgeting 		

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- Improved ability to do cost allocation, budget by performance objective, and measure performance results
- Enhanced employee and process efficiency via automated workflow
- Secure data and information
- Greater compliance with regulatory requirements
- Improved foundation for business intelligence/decision support
- Reduced reliance on manual processes and institutional knowledge
- Reduced business risk exposure

Progress:

This project was approved by the Board in April 2014, to bring PeopleSoft to the latest support version and extend its functionalities to address business processes gaps. The District conducted a fit/gap analysis in FY2016 to identify opportunities between the current and future states. The project RFP was published in August 2016 and final selection of top-ranked vendor was made in February 2017. Currently, IT is in negotiations with the contractor to finalize the statement of work and final price for the upgrade. IT expects to complete the negotiations by July, 2017.

However, the technology landscape for government enterprise resource planning systems (ERPs) has changed considerably. Off-the-shelf cloud products present an opportunity for the District. IT also looked at other agencies that are in a similar situation. City of Palo Alto implemented SAP ERP system more than 10 years ago, and now have decided to go to the market and look at other alternatives. County of Marin also decided to abandon their SAP implementation and decided to implement a tier-two product called Tyler Munis. Based on these market trend and call from the Board to research other alternatives, IT initiated an ERP Assessment Study. The objectives of the study are to:

1. Identify the effectiveness of the current Upgrade approach in meeting the business needs of the District.
2. Provide a comprehensive ERP Marketplace Assessment and trends for similar sized public and private organizations.
3. Identify the major options: PeopleSoft upgrade, other. Includes researching Oracle, SAP, other major viable products.
4. Provide an executive summary of options and recommendations for an alternative approach to the upgrade of PeopleSoft
5. Develop a recommended course of action.

Next Steps:

Complete assessment and bring findings to the Board in July or August.

1. Kickoff – April 27th
2. Survey Questionnaire Completion – May 12th

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	<ol style="list-style-type: none">3. Option Formation: Different ERP Strategy Options – June 9th4. Market Analysis – June 23rd5. Costing: Different Options for Total Cost of Ownership Estimate – June 23rd6. Final Report – July 7th:7. IT Recommendation: July 25th: IT is planning to present the final report and recommendations of the ERP assessment study to the Board. Based upon the recommendations of the study and the direction of the Board, IT will either seek approval of a contract to upgrade the PeopleSoft software, or reject all PeopleSoft Implementation Proposals and seek new proposals for alternative products that will best serve the business needs of the District.
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ID	Project	Status	Completion Date
A5	Implement Enterprise Content Management System	In Progress	Dec 2021
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> • Procure and implement software that: <ul style="list-style-type: none"> ○ Automates paper-based District business processes ○ Archives documents based on customizable retention rules ○ Augments other system workflows that rely – at some point – on paper ○ Facilitates document indexing, search and retrieval, collaboration, and versioning ○ Provides a long-term records management solution for designated District records • Integrate the system with SCVWD's other core automation (e.g., PeopleSoft, Maximo, GIS) as appropriate • Train software users to utilize the system's functionality and best practices <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> • Enhanced document creation and collaboration • Easier access to critical records and information • More efficient work processes • Reliable document archival and retention that meets regulatory requirements • Cost savings surrounding paper, printers, ink/toner and other related office supplies • Improved transparency and public disclosure • More predictable total life cycle costs • Less negative environmental impact <p><u>Progress:</u></p> <p>ISMP recommends implementing this project after the PeopleSoft/ERP system has been upgraded/implemented. In the meantime, various products for implementing enterprise content management (ECM) have been explored. Some of these products uses a single repository system, into which all the enterprise data such as documents, databases, photos, and images are moved. Other systems use an approach where the data remains in their native repositories. The systems then make a connection to these repositories to extract data for easy search and access.</p> <p>In preparation for the ECM, IT has been digitizing legacy hardcopy content and standardizing existing indexing metadata for various legacy collections.</p>		

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	<p>100% of “As-Built” engineering drawings and over 1 million microfiche images have been converted to digital formats. 40% of the District Library’s collection of District authored reports are now in digital format. IT is continuing to digitize records of enduring value within our currently existing systems, and to improve the indexing metadata associated with these records. This should make integrating these collections into an ECM more effective and efficient.</p> <p><u>Next Steps:</u> By September 2018, IT will decide which system type will best suit the needs of the District and begin implementation shortly thereafter.</p>
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ID	Project	Status	Completion Date
A6	Expand the use of business intelligence for performance management	In Progress	Jun 2020
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> • Select a long-term business intelligence platform • Automate the District’s financial analysis, business analysis, and management reporting functions • Deliver dashboard functionality to manager’s desktops, providing real-time decision support information • Integrate with SCVWD’s ERP and CMMS for comprehensive analysis and reporting • Leverage a modern, robust, supported and current solution • Enhance the District’s ability to gather, analyze and report on key operational information. <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> • More informed decision making • Active monitoring of key performance indicators • Proactive alerts delivered to manager’s desktops when performance tolerances are exceeded • Ability to analyze and report on data from a variety of sources • Mitigates the risk and effort associated with current business intelligence <p><u>Progress:</u> In 2015, Oracle Business Intelligence Tool was selected as the platform for data analysis and reporting. Staff were trained to deploy and utilize the software. Business Intelligence has been deployed for several systems including Engineering Drawings (EdCat), Water Conservation database, Training, Stream Maintenance Program and Risk management.</p> <p><u>Next Steps:</u> Deploy OBIEE for Ecological Monitoring Information Management System. Once the ERP is in place, assess suitability of OBIEE for financial analysis.</p>		

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ID	Project	Status	Completion Date
A9	Enhance Maximo for districtwide asset and work management	In Progress	Jun 2019
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> • Implement FME's original recommendations for Maximo • Implement IBM's Tivoli for IT service requests and case management and interface with Maximo for asset work order management • Enhance Maximo integration with other core systems (e.g., PeopleSoft, ECMS, fuel management, SCADA) • Improve Maximo's performance and usability <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> • Focused SCVWD resources on a single system for managing assets and work orders • An integrated and functional system to provide for more efficient decisions • Improved performance and usability of Maximo • Elimination of redundant, ancillary asset management applications • Reduced business risk exposure <p><u>Progress:</u> Developed PeopleSoft / Maximo timesheet and cost tracking interfaces; integrated Maximo with the new fuel management system; and completed upgrade of Maximo to improve performance and usability.</p> <p><u>Next Steps:</u> Implement the Maximo Upgrade Project, which will include an analysis of business processes and recommendations for improvements. These recommendations will be analyzed and prioritized based on staff resources and value to the business.</p>		

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ID	Project	Status	Completion Date
A10	Implement Maximo for Transportation for fleet management	Evaluation	Jun 2018
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> • Implement IBM Maximo's Maximo for Transportation • Integrate Maximo with PeopleSoft • Configure Maximo to meet regulatory reporting requirements for fleet management <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> • Improved ability to manage fleet assets in Maximo, including tracking of industry codes, fuel and meter integration, labor certifications, maintenance alerts, meter history and warranty recovery • More accurate fleet asset data • Enhanced ability to meet regulatory reporting requirements • More uniform application of asset management tools, including for fleet • Simplification of the District's application portfolio <p><u>Progress:</u> Maximo for Transportation will be considered if existing Maximo capabilities do not meet requirements.</p> <p><u>Next Steps:</u> Continue to work with Fleet to analyze business processes, determine requirements, and evaluate whether requirements could be met with existing capabilities.</p>		

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ID	Project	Status	Completion Date
A12	Implement GIS-enabled mobile work order management	Planned	Jun 2019
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> • Implement field access to Maximo work orders – both in online and offline mode (for locations with weak internet signal) • Allow field access to job plans, asset histories, and inventory information • Provide the ability to create work orders in the field to capture additional work that needs to be performed (e.g., repair and construction-related activities) • Provide the ability to capture and relate information such as photos in the field to a specified work order • Allow for the use of GIS in conjunction with Maximo in the field, enabling the use of GPS to automatically zoom into and view assets at a location where work will be conducted <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> • Increased field worker productivity • Easy access by both utility and watershed field workers to Maximo work orders • Ability to record work and attach relevant documents to a work order in the field • Ability to work on and complete the Maximo work orders from field locations that do not have wireless connectivity • More accurate location of district assets (via the use GIS and GPS) <p><u>Progress:</u> This project is dependent on completion of the Maximo Upgrade Project.</p> <p><u>Next Steps:</u> The Maximo Upgrade Project will include recommendations for improvements based on analysis of business processes. These recommendations will be analyzed and prioritized based on staff resources and value to the business.</p>		

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ID	Project	Status	Completion Date
A13	Implement Enterprise Case Management System	In Progress	Jun 2019
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> Implement a comprehensive system that provides the following capabilities: <ul style="list-style-type: none"> Requester to be able to use simple and direct means to submit their request (e.g., forms, email, call), obtain feedback on status, and be able to access self-help and knowledge base information Supervisor to allow manual and rule based dispatching, optimize the resources involved in servicing the request, obtain reports on KPIs, financial, and resource usage. Supervisor will also be able to obtain customer feedback, collaborate with staff performing the work, review case history, review equipment history, and contribute to the knowledge base Staff performing the work will have the flexibility to work with the system, collaborate with the requestor and others, access and contribute to the knowledge base, reassign/redirect/escalate the request Provide a uniform back-end system to monitor, track, and respond to the case requests <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> Reduced number of applications and databases to support enterprise case requests Robust system for implementing new and changing existing requests without programming A standard and easily supported platform for creation of new service requests instead of developing individual applications to support each type of request <p><u>Progress:</u></p> <p>IT believes that the District is better served with an application consolidation approach versus an enterprise approach to case management. Each of the Business area has specific workflows and requirements which require unique configuration to make it work. Trying to fit 18 separate needs from the different business groups into one system adds unnecessary complexity and increases costs and time to implement.</p>		

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	<p>IT chose to consolidate and leverage existing systems (tying the request to applications) where appropriate. Towards that end, IT:</p> <ol style="list-style-type: none">1. Consolidated seven business service request forms into one application.2. Selected and implemented ISight Case Management Tool for both Labor Relation and EEO for incident management.3. Consolidated real estate request form to the application4. Consolidated GIS admin request form and ISS online request with Helpdesk system <p><u>Next Steps:</u> Integrate board member scheduling request form and Clerk of the Board online research request form with Granicus.</p>
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ID	Project	Status	Completion Date
A15	Implement a water supply planning transactional database	Evaluation	Jun 2018
<p><u>Objectives:</u></p> <ul style="list-style-type: none">• Convert the Haake prototype database from MS Access into an enterprise level database• Provide tools and interfaces for loading data and obtaining reports; these tools will include data entry as well as batch loading tools• Load the historical data from the existing system into the new database <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none">• Easier access to water supply data• A single platform for integrating water supply planning model inputs and historical results• Reduced business risk exposure <p><u>Next Steps:</u> Analyze existing system and work with business owners to redesign if there are changes in business requirement.</p>			

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ID	Project	Status	Completion Date
A16	<p>Implement an ecological monitoring information management system (EM-IMS)</p> <p><u>Objectives:</u></p> <ul style="list-style-type: none"> • Coordinate requirements, design, and development with the District's asset management program and GIS master plan • Develop a comprehensive system architecture based on best practices and new district standards • Establish a central repository for ecological data and information <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> • Easier access to reliable ecological data and information • Reduced business risk exposure <p><u>Progress:</u> Water Quality module completed in 2014 and enhanced in 2016. Request system and Wildlife module will be completed in 2017.</p> <p><u>Next Steps:</u> Phase 2 of development of the Wildlife includes importing historical information. Vegetation and Fisheries modules will be scheduled based on the availability of subject matter experts.</p>	In Progress	Jun 2020

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ID	Project	Status	Completion Date
A19	Implement data and information architecture standards and policies	Planned	Jun 2019
	<p><u>Objectives:</u></p> <ul style="list-style-type: none"> • Establish district-wide information policies and standards • Develop and document a district-wide information structure and flow • Position the district for enterprise architecture and better abstraction of data from applications <p><u>Expected Benefits:</u></p> <ul style="list-style-type: none"> • Increased efficiency through better information management • Enhanced access to information through improved organization • Improved understanding of district information policies and standards • Optimization of storage capacity through refined retention guidelines and usage policies • Reduced information redundancy • Improved ability to respond to regulatory changes and Freedom of Information Act requests <p><u>Progress:</u></p> <p>To position the District for enterprise architecture, IT identified the following work as foundational, but which was not addressed by the ISMP:</p> <ul style="list-style-type: none"> • An accurate inventory of District's software and technologies • A precise documentation of application relationships • A unified platform that gives context to decision-making <p>IT evaluated and is currently implementing an Application Portfolio Management System to inventory over 100 applications currently in use by the District, along with their associated technologies, owners, skills, and vendors among others.</p> <p>This first step creates the baseline in which IT can communicate change and progress and provide a comprehensive view of the software District employees use in their daily work.</p> <p>The meta-data will help identify application / information redundancies and provide insight into competing initiatives as well as enabling better planning decision by providing an accurate view of the District's technology "health".</p>		

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	<u>Next Steps:</u> Deploy application portfolio software system to the rest of the district and establish districtwide policies and standards.
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