Information Technology Capital Investment Program
Project Status Report

To: Information Technology Strategy and Investment Committee
John Vittner, Office of Policy and Management

From: Susan Shellard

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Agency: Department of Economic and Community Development
Project: Lean-Driven IT Revitalization Project--Plateau 1 and 2

Project Manager: Susan Shellard/Bart Kollen

Reporting Period: Project Inception through 06/30/2018

Total Funds Requested: $4,841,500

Total Funds Allotted to Agency: $4,291,500

Accumulative Total Capital Fund Expenditures to Date: $2,761,112

Brief Project Description/Summary:
This project focuses on development of an effective technology platform and system environment which will enable DECD to efficiently serve its diverse client base within budget constraints. Central to the agency's strategy is the implementation of a client relationship (CRM) management system (Microsoft Dynamics) which will enhance efficiency by automating work processes, facilitate outreach and provide data for analysis. Plateau 2 will extend the use of the Client Relationship Management (CRM) system, implement electronic content management (ECM) to create efficiencies in document storage and retrieval, initiate online application submission via a client portal, create efficiencies in the management of agency desktop units, integrate CRM with applications such as CORE and the Nortridge loan system and extend the benefits of the CRM system to the Department of Housing (DOH).

Summary of Progress Achieved to Date:
CRM: Cloud installation of Microsoft Dynamics was completed. The transition to cloud service provides benefits including decreased resource requirements for implementation of a client portal. CRM is in use by DECD business development, brownfields and capital projects areas. Remaining releases will be completed by December 2018. A draft statement of work was provided to Department of Housing and the agency's response is pending. **Electronic Content Management (ECM) using FileNet**: system design is completed, proof of concept demonstrations are underway, integration with CRM has been initiated, design for migration of legacy data is completed, testing will be completed during Sept. to Oct. and full implementation will occur in December 2018.

Issues and Risks:
CRM (DECD) and ECM (DECD and DOH) implementation are on track for full implementation by December 2018.

The timing of DOH CRM implementation will be dependent on agency feedback and available resources.

Next Steps & Project Milestones:
CRM (DECD) releases to be completed by December 2018

ECM (DECD and DOH) releases to be completed by December 2018

Develop project specifications (Janauary 2019) for implementation of Microsoft System Center (March-April 2019)

Finalize plan for DOH implementation of Microsoft Dynamics (CRM) (per agency decision)

Planning for CRM online client portal: Sept. 2018, for implementation first quarter calendar year 2019.