GUIDE TO Community Development Project Success

PART 1: IMPLEMENTATION READINESS ACTIVITIES

Implementing a new Community Development solution can lead to a big payoff. Improved automation of permitting and/ or licensing processes – including inspections, code enforcement, planning and zoning, application processing, and approvals – can drive economic growth, meet rising service expectations, and help you achieve efficiency for the long term.

First, however, it's important to set yourself up for implementation success and ensure your team's prepared for significant change. To help get you project-ready, Clariti has prepared the following list of ideas, tasks, and activities to start you on your path to success, including best practice tips for:

1. Organizational Planning
2. Goal Setting
3. Project Readiness

1. Organizational Planning

This section is focused on laying a strong foundation within the leadership team. These projects can be long and complex, so it's critical to engage the stakeholders early. The key areas to build out are:

- **Agency Engagement Strategy (internal)**
- **Communication Strategy**
- **Program/ Project Management**

Agency Engagement

Engaging leadership early and establishing clear expectations with staff from the start creates alignment and sets the priority of the project. This project will impact agency operations from top to bottom, so it should be viewed as a strategic initiative of the highest priority - not just as an IT project. How the senior leadership views and talks about the project will have a trickle-down effect, and ultimately determine how staff prioritize their activities.

- Prepare/Conduct internal change readiness assessments before project initiation
- Coach agency leadership on how to prepare staff for the realistic level of project participation
- Set measurement targets to ensure success
- Establish key leadership roles and relationships across departments early, including in IT. Find wins (even small ones) for your team to keep them engaged and give them positive talking points

Communication Strategy

A comprehensive communication strategy that plans for frequent communication and updates for your executive team and project staff is critical to project success. It can help you prevent roadblocks, miscommunication, and misalignment, and ensure that users are informed of upcoming events and successes. It’s therefore imperative you develop a communication plan that includes talking points for leadership; a regular cadence for updates to internal staff; and a strategy for communicating with your constituents (public, contractors, etc.).

- Clearly outline what the system will and won’t do
- Make sure the measurement targets/goals resonate with senior leadership to keep the team aligned with your message
- Start communicating at a project/program level early, and encourage functional leaders to do the same with customers and staff. Share the news early and often!
- Tailor communications to the needs of each functional area and each phase of the project

Program/Project Management

Project Management includes all the activities associated with planning, coordinating, and managing schedules, resources, relationships, risks, and any issues that may arise over the course of a project. Reliable Project Management reduces the risk of failure, facilitates quality throughout the system implementation process, and imposes accountability into daily project activities.

- Establish a steering committee to oversee the project (including the vendors). This will provide a response mechanism to remove any blockers and keep the project moving forward
- Confirm that your project management team - including IT - is adequately staffed and appropriately skilled to meet deadlines and needs
- Develop a strong project management structure at the agency level to coordinate with the IT implementation team
- Consider writing new job descriptions to account for how business processes, roles, and interactions will change with your new system. This will help you better manage organizational change. If you plan to have a phased approach, prepare for the gaps between phases, and recognize the importance of keeping the team intact

2. Organizational Planning

Setting goals upfront creates alignment for your agency, articulates what's important to the project team, and accounts for the project 'what ifs' so that you're prepared and equipped to quickly pivot when necessary.

Target

It's important to understand what you're looking to get out of your project. What's your ultimate goal? While the final outcome will of course be the complete system replacement, there may be other priority areas to focus on simultaneously that can reduce your agency's risk, or areas where Clariti can help provide high customer value faster.

- Target systems that pose the biggest risk of imminent failure, reside on unsupported platforms, or have significant operational challenges first

- Target functional areas in early phases that have a high volume of permits/revenue/citizen engagement. This approach has a maximum outward impact and provides key project talking points
- Consider functional areas that have significant application or case backlog. These areas offer a great opportunity to highlight ‘before and after’ efficiency gains

→ Track

Make sure you’re prepared to share reports and insights with the City or Council. There is an opportunity to provide more insight than just project status, which is valuable not only for external reporting, but also to support internal agency communication.

- Develop meaningful key performance indicators (KPIs) to assess current performance
- Do upfront data measurement (for each target agency) against KPIs to establish a baseline
- Track current costs (Software, professional services, change orders, annual maintenance, internal transfer costs) to support your current system

→ Measure

Do some preliminary work to understand what metrics you can report on now, and which metrics you want to be able to measure. If you are tracking metrics now, it’s easy to track efficiency improvements (before/after). If not, you can work with the project team to articulate the needs upfront.

- Establish target metrics/goals to measure progress and communicate success (internally and externally).
- Application processing time
- Increase data accuracy and consistency
- Improve compliance and enforcement activities
- Drive increased revenue
- Redirect agency staff to other priorities
- Project cost is not the best way to articulate project value.

3. Project Readiness

This section focuses on tactical readiness activities your agency can check off before the RFP.

Project Length

Part of the pricing consideration is the overall project length. We calculate effort based on the scope of deliverables and the below factors which determine the effort and staff commitment/duration.

If you have schedule expectations, it helps to state those upfront.

Configuration Requirements

Provide as much information as possible about: permit types, (complexity, workflows, approval processes, any special numbering requirements, etc.); complaint/case types, inspection requirements, online system requirements (transactions – initials, status inquiry, look-up values, etc.)

Projects that have more detailed requirements usually have fewer change orders during the project. The more detail, the better.

Citizen Services

Develop a comprehensive list (matrix) of each permit/license, application, inspection, and code enforcement activity and map the online services anticipated to be delivered to your constituents as well as the delivery method (online portal, mobile devices, chat services, etc.).

This helps articulate the work effort for configuration and testing. It can also help your agency step back and evaluate the overall customer service experience you want to provide as a result of this project.

Training

Establish a training delivery model.

The three common training delivery models are:

- Train the Trainer (TTT)
- End-User Training (EUT)
- Computer-based Training (CBT)

Train the Trainer (TTT)

In this model, the City/County identifies key individuals across relevant functional areas to be trained by the project team. Normally, the number of Agency Trainers is limited by design. This delivery model turns employees into subject matter experts who can teach other members of your agency. Once complete, the trainers (agency users) develop job-specific training materials and deliver training to the end users.

End-User Training

The Train the Trainer approach creates agency self-sufficiency and is very cost-effective. However, this model places the responsibility for scheduling, artifact creation, roll-out, and staff training on internal resources. Therefore, it's important to note that these activities will be accounted for outside of the vendor project plan.

This model is based on vendor training of your entire workforce. Depending on the number of employees, job function, and/or regional offices, end-user training will be rolled out in a planned number of sessions. The advantage is that the training is structured and aligned to the business function, and employees have a clear commitment to the project from senior leadership. This typically results in less resistance toward the new technology, and a more technologically capable user base.

However, this requires more vendor participation which has commensurate costs attached. Class sizes are normally limited to 10-20 participants, and the training curriculum is built around business functions. While the agency is still involved, the system integrator/software vendor is primarily responsible for the training execution and the tasks and material creation identified in the project plan.

Computer-based Training

Online (Web-based) self-paced training allows end-users to complete interactive lessons that walk them through the processes of performing common tasks and take tests based on their performance and understanding of the software.

Generally, CBT is most effective when coupled with another training delivery model described above due to the overall complexity and city-specific configuration of these projects.

In addition to the delivery models (Train the Trainer, End-user Training, or Computer-based Training) described above, you should also consider the nuances of each training outcome.

How do I use the system?

Vendors build their training around the system capability and much of the training program/user guides are designed around navigation and general use of the system. Training will address broad system capabilities based on functional roles.

How do I do my job?

Once an end-user understands the operation of the system, additional training/context needs to be provided as to how they do their jobs. It's an agency's responsibility to ensure instructions and step-by-step processes are documented, and that any new business process implications are communicated. New computer systems impact the way users do their job, and impose new business processes for data capture. One of the biggest barriers to adoption results from training that focuses on system use only.

→ Reports, Letters, Permit Print Formats, License Print Formats

Take inventory of your letters and reports before the RFP phase. Your inventory likely has years of historical documents filled with duplicate, out-of-date, or partial versions.

Pre-RFP is a great time to:

- Review which letters and reports you need.
- Identify your gaps. What reporting do you need that is not currently available?
- Confirm which, if any, letters and reports are done outside the current system
- Document as much information as possible regarding the number/type of reports required; the number/type of letter templates by functional area; and the number of license prints required.

Reducing and consolidating the number of reports and letters you need saves effort and lowers costs. Consider an option where the vendor trains someone on your team to build the reports/letters you need. This not only keeps the project costs down, but also empowers your team to be self-sufficient post go-live.

→ Data Conversion

List the number of current systems you use including Access tables, Excel files, etc., as well as general data quality, DB size, and list rows and columns. This will help us size the conversion effort.

Start data cleanup activities early (pre-RFP) to improve data quality and reduce the time spent on these activities. We will likely come back to you with questions around who's responsible for de-duplication and data cleansing. Having a good understanding of the data pre-project will minimize delays.

You can also expect that mapping your existing data to the new system may not be clean. Since the expectation is to modernize workflow processes, and your existing data is structured in a way that supports your current workflows, mapping data cleanly can be challenging, especially for in-flight records (ex) permits that have started review but have not yet been issued).

To prevent mapping delays, develop a strategy for in-progress items and for current customers' accounts that need to be merged with the new system.

Integrations and Interfaces

Identify a specific list of software interfaces (number, function, and direction – one-way/two-way). Knowing the file format, flat-file, XML, etc is also beneficial.

- Common interfaces are:
- Electronic planning system
- Esri
- Accounting System
- ePayment system
- Construction Licensing system
- ERP
- Single sign-on
- Office 365

Organizational Change Management

Embrace change. Don't attempt to make your new system the old system. Identify any change management objectives as part of the project requirements. Often transformational projects require some degree of organizational realignment. You should address these early in the project planning.

Building permitting, code enforcement, planning and zoning, and inspections are the heart of a City/County in the sense that all data captured from the application, intake, ongoing management, inspection, complaints, and related enforcement is stored in one system. By its very nature, when you change the system, you simultaneously change how data is captured. This change needs to be accounted for.

Your agency has two choices:

1. You can target change management as part of a broad-based business consulting service designed to help organizations with their change efforts and integrate people issues with their business strategy
2. You can tackle change management through a package-enabled approach which is only focused on the changes resulting from the introduction of the new solution.

It's important that your agency clearly articulates what it expects from the vendors regarding change management. There is a significant time and cost impact depending on your choice.

- In many projects there is a 'we've always done it this way mentality' which can result in resistance to change. Consider acknowledging change by re-writing staff job descriptions. This indicates the significance of the change and that it comes from leadership. It clearly defines the expectation for staff.

- Ultimately, you can follow these tactical Change Management steps for success:
  - Consider a change manager for the project
  - Share the why and the how of the new solution. How will it benefit staff? Why are you making the change? Sharing this early can reduce the likelihood that your staff will be reluctant to change.
  - Find the unexpected champions and have them help out the broader team
  - Have contingency plans in place. Inevitably some staff will have challenges at go-live.

→ Resource Planning

Ensure success by planning ahead to have the right resources available at the right time:

- Plan to have a full-time Project Manager
- Proactively request additional coverage or resources. Assume that your SMEs (Subject Matter Experts) will need to contribute a chunk of their time to the project.

Consider bringing these resources in ahead of project kick-off to ramp support for your day-to-day business activities.

→ Adoption of best practices/ Leverage out-of-the-box functionality

Adopting best practices and aligning with out-of-the-box product functionality can significantly reduce implementation risk, improve timelines, and regulate cost since most of the required functionality is available through basic product configuration.

→ Contingency

Include a contingency budget in the range of 10-20% in your plan. On paper, project requirements don't always capture the nuances and complexity of your business requirements in practice, so it's common to experience some changes over the life of the project. Planning ahead provides you some flexibility without seeking new funding authorization.

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