



# State of Idaho

## Information Technology Resource Management Council (ITRMC)

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September 2, 2009

### ITRMC Project Review Request

Your project (see list attached) has been selected by the **ITRMC Project Review Committee** to be presented to ITRMC on: **October 02, 2009 (9:30 – 11:30, East Conference Room of the JRW Building, 700 West State Street, Boise)**

ITRMC is required by Idaho State statute Title 67 Chapter 57 (5) to review all large scale IT and telecommunication projects. The purpose of this request is to provide the information necessary to conduct that review. Follow-up information may be requested and an agency representative will be requested to present this information to ITRMC. Provisions will be made to present via teleconference if requested.

Date Submitted:	September 18, 2009	Agency Director:	Mike Gwartney
Agency:	Office of Chief Information Officer	Project Number:	344
Project Name:	Enterprise Consolidated Messaging Project		
Project Manager (include contact information)	Carla Casper, 208-332-1853 <a href="mailto:carla.casper@cio.idaho.gov">carla.casper@cio.idaho.gov</a>		
Total Project Budget:	\$2,324,900 one-time, \$646,806 ongoing	Project Start Date:	April 2008
Is project currently funded? Y or N	No	Estimated End Date:	FY13
Executive Sponsor:	Mike Gwartney, Director, Department of Administration		

The details of this request and the associated deliverables are fully described in ITRMC Guideline G210.

Description	Deliverable
1. Project Summary. Describe the problem that the project will solve. What will it do? How will it help the organization? The Consolidated Messaging Project (CMP),	A. Type of Project. <ul style="list-style-type: none"> <li>Project Type "ICS"</li> </ul> B. A detailed description of the project. <ul style="list-style-type: none"> <li>The purpose of the State of Idaho Consolidated Messaging Project is to</li> </ul>

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<p>started in April 2008, as part of Governor Otter's plan to improve the way Idaho's public agencies conduct business. Today, Idaho taxpayers support over 80 email systems. This project consolidates those systems into one reliable system managed centrally with advanced security functionalities called the Idaho Consolidated Services system. More importantly, the project is building the foundation to allow for future consolidation of services such as faxing, imaging, voice mail messaging, and telephone services for state agencies.</p>	<p>design, implement, and manage a consolidated statewide messaging system that will deliver increased operational efficiencies, collaboration capabilities, cost efficiencies, and cost avoidances to state agencies. A consolidated system will facilitate business continuity across state agencies, increase accessibility, improve disaster recovery capabilities, and enhance emergency-response communication. This project also reinforces and advances all five strategic goals in the State of Idaho's Information Technology Strategic Plan.</p> <ul style="list-style-type: none"> <li>• A state-hosted Microsoft Exchange 2007 solution.</li> <li>• Active directory design with one forest, one domain (Microsoft's best practice)</li> <li>• Dell hardware leased from the vendor.</li> <li>• The home for the computer equipment will be the State Controller's Office.</li> <li>• The Department of Administration will be responsible for the day-to-day operations and management of the Consolidated Messaging Services.</li> </ul> <p>C. Project Charter</p> <ul style="list-style-type: none"> <li>• The Project Charter is available at <a href="http://cio.idaho.gov/pdf/messaging_project_charter.pdf">http://cio.idaho.gov/pdf/messaging_project_charter.pdf</a>.</li> </ul>
<p>2. Business Case. Why is this project being proposed? The business case should declare quantifiable benefits when possible, i.e. the project will reduce costs by \$_____ per year, be mandated by law, or reduce some form of risk.</p>	<p>A. The cost/benefit analysis developed for the project is as follows:</p> <ul style="list-style-type: none"> <li>• State agencies will derive operational efficiencies: <ul style="list-style-type: none"> <li>○ Efficient and effective inter- and cross-agency communication</li> <li>○ Faster and more effective statewide notification and response</li> <li>○ Increased capabilities and more cost-effective business continuity and disaster recovery</li> <li>○ Consistent and higher level of security</li> </ul> </li> <li>• State agencies will derive cost efficiencies: <ul style="list-style-type: none"> <li>○ Ability to accurately capture costs of messaging services to the State of Idaho</li> <li>○ Opportunity to repurpose FTEs currently administering messaging systems</li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>○ Realization of economies of scale</li> <li>● State agencies will realize higher business benefits: <ul style="list-style-type: none"> <li>○ Agencies will be afforded service level agreements (SLAs)</li> <li>○ Increased system uptime and accessibility</li> <li>○ Consistent and efficient rollout of new technologies and upgrades/patches</li> <li>○ Decreased agency IT infrastructure</li> </ul> </li> <li>B. A description of the risk or mandate that the project addresses. <ul style="list-style-type: none"> <li>● As stated in the Project Summary, the Consolidated Messaging Project (CMP) is part of Governor Otter's plan to improve the way Idaho's public agencies conduct business.</li> </ul> </li> </ul>
<p>3. Budget. What will the project cost? The total estimated costs should include all costs associated with the project.</p> <ul style="list-style-type: none"> <li>●</li> </ul>	<ul style="list-style-type: none"> <li>A. Overall budget, subtotaled for each cost category for each fiscal year of the project: <ul style="list-style-type: none"> <li>● Fiscal year 2008 - \$75,000 provided through OCIO existing operating budget</li> <li>● Fiscal year 2009 - \$70,000 OCIO existing operating budget, \$50,000 from Department of Insurance, \$236,200 received as a project budget request</li> <li>● Fiscal year 2010 – no funding received</li> <li>● Fiscal year 2011 – requesting \$1,893,700 one-time funding and \$161,600 in ongoing funding to continue with the project.</li> <li>● At project completion the anticipated ongoing funding required to sustain the system is \$642,806 which will be paid through agency charge backs.</li> </ul> </li> <li>B. Sources of funds, including grants, federal funding, or encumbrances. <ul style="list-style-type: none"> <li>● Source of funds have been General Funds and agencies contribution. Ongoing costs will be charged back to the agencies beginning in fiscal year 2011</li> </ul> </li> <li>C. Identify any constraints on funding for the project. <ul style="list-style-type: none"> <li>● Lacking of project funding by the legislature</li> </ul> </li> </ul>

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	<p>D. New Personnel. Indicate any new Full Time Position(s) (FTP) (also known as Full Time Employees [FTE]) or dedicated contractors required to complete and/or sustain the project.</p> <ul style="list-style-type: none"> <li>• At this time no additional staffing is needed as funding is received and the system grows beyond the initial 5000 user base additional staff will be required.</li> </ul>
<p>4. Schedule, Time Constraints &amp; Dependencies. Identify any critical time elements and dependencies that would affect this project.</p>	<p>A. Project Schedule. Indicate a timeline by defining the project life cycle by fiscal year.</p> <ul style="list-style-type: none"> <li>• Initiation – FY08: 04/08</li> <li>• Planning – FY08-09: 04/08 – 12/08</li> <li>• Execution – FY09-13: 12/08 – 12/12</li> <li>• Closure – FY13 – 12/12</li> </ul> <p>B. Indicate project milestones used to provide a means to measure progress and the completion of major tasks.</p> <ul style="list-style-type: none"> <li>• Project Charter is complete</li> <li>• Business/functional and technical requirements are defined and approved</li> <li>• Messaging solution options are defined</li> <li>• Statewide messaging system solution details, strategy and approach are decided upon</li> <li>• A communication plan is developed and approved</li> <li>• Project budget and schedule for all applicable fiscal years is defined and approved</li> <li>• Enterprise architecture for statewide messaging system is complete</li> <li>• Operations and maintenance plan is approved</li> <li>• State-agency rate structure is complete</li> <li>• Service-level agreements are defined</li> <li>• Post-consolidation governance plan is complete</li> <li>• Memorandums of understanding with participating state agencies are signed</li> </ul>

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	<ul style="list-style-type: none"> <li>• Individual agency readiness plans are developed</li> <li>• Project pilot is implemented</li> <li>• Project funding is received</li> <li>• Agency rollout has begun</li> <li>• Agency rollout is complete</li> <li>• Project closeout is complete</li> </ul> <p>C. List of critical time constraints and dependencies.</p> <ul style="list-style-type: none"> <li>• Strong Executive Sponsorship - Key senior executives are committed to active leadership, decision making, and involvement.</li> <li>• Vendor Management - The state is managing the project, not the vendor. Vendors are in an advisory role only.</li> <li>• Stakeholder Management - The needs and concerns of the stakeholders are addressed in an effective and timely manner.</li> <li>• Constant Value Add - Implementation occurs in phases, continually adding value and improving operations.</li> <li>• Project Planning - Project objectives, scope statement, and business and technical requirements are the guiding forces of the project.</li> <li>• Skilled Resources - Experienced state and contracted resources are in key project management positions.</li> <li>• Resources – Experienced resources are identified to support the project on an on-going basis.</li> <li>• Risk Management - Routine identification, mitigation, and tracking of risks including independent oversight of the project are assured.</li> <li>• Collective Benefit – State agencies have an adequate level of trust and interdependency and reap individual and collective benefit.</li> </ul>
<p>5. Project Risks. What risks does your agency anticipate with this project? What mitigations are planned?</p>	<p>A. Listing of known risks and the mitigation strategy for each.</p> <ul style="list-style-type: none"> <li>• There are numerous technical environments that will have to be converted to a single technology solution. Mitigation: Time, planning, and possible agency funding will be required for agencies to transition to ICS and the Microsoft Exchange system (ITRMC standard).</li> </ul>

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	<ul style="list-style-type: none"> <li>• The unwillingness of agencies to cede control over part of their organization to an outside agency. They may feel that they need to control their own content and are uncomfortable having sensitive messages handled by another agency. Mitigation: The solution was designed so that agencies control their own Organization Unit (OU). Agency IT personnel continue to have the kind of control over their internal users, computers, and servers as they had in the past, but shared services state-wide are now be easily achievable. Proof of the quality system will be needed to influence unwilling agencies.</li> <li>• Agency fear that a centralized service will cost their agency more and provide fewer services. Mitigation: Proof of a quality system at a low cost will be needed.</li> <li>• Inadequate funding and a lack of full time staff dedicated to the project. Mitigation: Additional funding and staff are needed to go beyond 5,000 users. We anticipate no significant out-of-pocket costs to agencies for migration to or operation of the messaging system in FY10. Beginning in FY11, agencies will pay a per-mailbox charge for each mailbox it chooses to maintain on the consolidated system.</li> </ul> <p>B. Completed Risk Assessment G215.</p> <ul style="list-style-type: none"> <li>• See attached G215 Risk Assessment</li> </ul>
<p>C. Possible Solutions/Alternatives. Have you determined alternative solutions to the problem, what are they? Is the solution in compliance with ITRMC policies and standards?</p>	<p>A. Listing of alternatives considered</p> <ul style="list-style-type: none"> <li>• Microsoft Exchange hosted by a third party</li> <li>• An open solution such as Google, etc. hosted by the vendor.</li> </ul> <p>Criteria to evaluate these alternatives were identified and organized by the:</p> <ul style="list-style-type: none"> <li>• Business requirements and benefits desired by the various agencies,</li> <li>• Projected costs of each alternative, and</li> <li>• Risks associated with each.</li> </ul> <p>B. Description of how project meets ITRMC standards and policies.</p> <ul style="list-style-type: none"> <li>• The Consolidated Messaging Project aligns with the five major goals of the</li> </ul>

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	<p>Strategic Plan:</p> <ul style="list-style-type: none"> <li>○ Simplify delivery of government services and information.</li> <li>○ Manage information technology from an enterprise (statewide) perspective.</li> <li>○ Protect the privacy and confidentiality of citizen information.</li> <li>○ Promote collaborative relationships between state agencies, public and higher education and local governments.</li> <li>○ Use 'state-of-the-art' procurement practices for acquisition of information technologies.</li> </ul>
<p>D. Collaboration/Consolidation. Are there opportunities for collaboration with another agency on this specific project? Would you be interested in received this as a service from another agency?</p>	<p>A. List of possible opportunities for collaboration.</p> <ul style="list-style-type: none"> <li>• The entire project is based on collaboration and consolidation. Executive agencies must join; elected officials are encouraged and will be asked if they would like to participate.</li> </ul>