

Office of Efficient Government MyFloridaMarketPlace Business Case Submission February 2010

Change Control Board Plan

Recommendation:

The Department of Management Services (DMS) Division of State Purchasing (SP) recommends continuance of the existing MyFloridaMarketPlace (MFMP) Change Review Board (CRB) structure and process. The structure and process has worked very successfully from its re-creation in 2006 to the present. The CRB has not only been instrumental in defining and prioritizing enhancements it was especially successful during the upgrade of Ariba Buyer to the current Ariba version 8.2.2 (MFMP 2.0). The CRB is being utilized again for the upgrade of Ariba Buyer to Ariba 9R1 (MFMP 3.0)

Members:

The CRB membership consists of volunteer liaisons from 13 of the 32 state agencies that use the MFMP system for their day to day purchasing and other related activities. The CRB members do not have a term limit at this time.

Early in the MFMP contract, Modification No. 2 created a Contingency Budget, a source of funding to provide for system enhancements and improvements.

The CRB meets on an as needed basis, usually 2 to 3 times per year. The CRB assists DMS by prioritizing change requests or system enhancements to the MFMP system, reviewing designs and testing and approval of enhancements.

Agency	Representative	Email Address
AHCA	Cathy McEachron	mceachrc@ahca.myflorida.com
DC	Doug McCleary	doug.mccleary@mail.dc.state.fl.us
DCA	TBD	
DCF	Paul Mauck	paul_mauck@dcf.state.fl.us
DEP	Darinda McLaughlin	darinda.mclaughlin@dep.state.fl.us
DFS	Michelle McBride	michelle.mcbride@myfloridacfo.com
DJJ	Richard Haire	richard.haire@djj.state.fl.us
DMS	Anthony Garcia	anthony.garcia@dms.myflorida.com
DOH	Jim Brewer	jim_brewer@doh.state.fl.us
DOR	Beth Sparkman	sparkmab@dor.state.fl.us
DOT	David Callaway	david.callaway@dot.state.fl.us
FWC	Sharon Bussey	sharon.bussey@myfwc.com
HSMV	Kevin Bailey	kevin.bailey@hsmv.state.fl.us

For more information about the CRB and its specific activities, the following link will take you to the above membership, a list of presentations and meetings minutes, etc.

http://dms.myflorida.com/business_operations/state_purchasing/myflorida_marketplace/mfmp_buyers/myflorida_marketplace_toolkit/mfmp_meeting_materials

Structure and Process:

The CRB was created in March 2006 when the planning was first initiated for the Ariba Buyer upgrade. It proved so successful that the CRB structure and process has continued to this day.

Attached is a copy of the CRB Change Request Management Process and a copy of the CRB Change request forms that are utilized by MFMP customer agencies to initiate change requests. A list of existing change requests and change requests implemented are found at the web site above.

Recent Activities:

The CRB has had little change in its process since March 2006 to the present. However, one exception is a recent change made by DMS in 2009. During two separate CRB meetings, the CRB was informed by DMS that the Contingency Budget had to provide for both customer driven changes and improvements to the system as well as enterprise driven changes and improvements (refer to section 19 for more information on enterprise changes and governance structure). Examples of enterprise changes that DMS addressed includes, but is not limited to, changes in Florida Statute that require system changes, working with other enterprise agencies such as the Department of Financial Services on changes that effect the entire enterprise, addressing audit findings, etc. DMS also represents vendor desired enhancements based on feedback from vendors through various training forums for vendors, through the DMS Quarterly Customer Satisfaction Survey results where vendors are surveyed and through the MFMP Customer Service Desk Survey Approach..

DMS agreed that CRB members would be made aware of all changes and utilization of the Contingency Budget and the CRD would continue to drive customer focused enhancements.

It should be noted that this “change” was not a new change but in fact had been a process in effect for some time but never formalized. The lack of formalization sometime led to friction between DMS and its customers. When explained at the meetings it was well received by the CRB.

Conclusion:

Due to its proven success, DMS intends to retain the capability to provide for system change and enhancements by retaining a Contingency Budget. A concrete example includes the augmentation of the contingency budget in the contract renegotiation with Accenture that took effect and added nearly 4,000 hours for system enhancements at no cost to the state (refer to section 7). The augmentation of the Contingency Budget allows DMS to retain the CRB structure and process.



Change Request Management Process 3/07/2006

- (1) Users submit change requests to their Agency Purchasing Director or Finance and Accounting Chief, or equivalent position.
 - Requests will no longer be submitted via the Help Desk or Stakeholder Management liaisons.
 - Purchasing Director and Finance and Accounting Chief for each agency will approve, revise or resolve CRs received, and/or originate CRs.
 - Examples of change requests: New or improved functionality
- (2) Purchasing Director or Finance and Accounting Chief submits approved change requests using change request form to email address: changerequest@myfloridamarketplace.com.
- (3) Approval and prioritization of change requests by a Change Review Board. DMS, Functional Architect, and Operations Support will provide guidance as requested or necessary.
 - This will be accomplished in a meeting in which the Change Review Board members deny/resolve, revise and/or approve, the CR, and if approved, determine the priority of the submitted change requests based on the impact to the entire system and to the individual agencies involved.
 - Detailed estimates for "Top 5" prioritized CR's will be completed.
 - If denied, the details will be communicated back to the requesting Agency, DMS, and MFMP.
 - Meeting will be held quarterly, or as otherwise scheduled by the CRB.
 - CR's to be reviewed must be submitted at least 30 days prior to the quarterly meeting date. If a CR is submitted after the 30 day requirement, the CR's will be reserved to the following quarterly meeting date. This allows for preliminary feasibility analysis to be completed.
- (4) Functional Architect records all change requests in Pivotal (tracking system). Denied change requests will be closed upon being entered in Pivotal. This allows for tracking purposes.
- (5) Operations Support team, Functional Architect, Stakeholder Management team, and DMS will review change requests for feasibility.
 - It will be determined if the change request is 1) not possible due to system limitations, 2) should be handled with a process change, 3) requires an application system change, or 4) no change request needed, requires additional training. If the request requires an application system change, the team will give an initial recommendation for the implementation approach and the decision will be communicated back to the Change Review Board.
- (6) Operations Support determines detailed estimate.
 - The Operations Support team will prepare a detailed estimate of cost and implementation time including design, build, and test.
 - Limit of (5) detailed estimates, "Top 5".
- (7) Detailed estimate is presented at a meeting to Project Director and the Change Review Board for implementation and scheduling decisions.
 - Meeting to take place six weeks from quarterly meeting date (example: January 1 Quarterly meeting date, February 15 Detailed estimate meeting). Implementation and scheduling decisions to be discussed.
 - The detailed estimate will be presented along with a work plan for implementation. The work plan will take into account the modifications that are in progress and time required for regular maintenance. The team will identify a targeted code release (monthly) for the change request.
- (8) Functional Architect updates Pivotal with feedback from Project Director and Change Review Board.
- (9) Operations Support team completes Change Request design
- (10) Design sign-off obtained from the Project Director and Change Review Board Chairperson.
- (11) Change Request is coded and tested internally by the Operations Support team.
- (12) Representative Users conduct user acceptance testing and sign-off when appropriate.
- (13a) Operation Support Team implements change request.
- (13b) Functional Architect updates Pivotal and Change Request Approval Summary.
- (13c) Release notes distributed to users.
- (14) System enhancement survey distributed to CRB.

**The make-up of the CRB: Combination of Purchasing and Finance and Accounting representatives, 13 participants from Agencies. Term

CHANGE REQUEST



A Change Request identifies a system modification that would enhance the functionality, usefulness, or user-friendliness of the system. All change requests will be evaluated and prioritized by the MyFloridaMarketPlace project team and Change Review Board.

Please fill out the information requested below. When complete, please email this Change Request to changerequest@myfloridamarketplace.com. All fields must be filled out completely for the Change Request to be considered in the quarterly review process. Change request must be approved by either the Purchasing Director or Finance and Accounting Chief for the agency.

Requesting User

Date Created:	Agency:
Requestor:	Requestor Phone:
Requestor Email:	

Agency Approver (Purchasing Director or Finance and Accounting Chief)

Date Approved:	Approver Phone:
Approver:	Title:
Approver Email:	

What part of MyFloridaMarketPlace does this Change Request impact?

- | | | | |
|------------------------------------------------------------|----------------------------------------|------------------------------------------------------|-----------------------------------|
| <input type="checkbox"/> Req./P.O. | <input type="checkbox"/> Disbursements | <input type="checkbox"/> FLAIR/Aspire Integration | <input type="checkbox"/> Sourcing |
| <input type="checkbox"/> Vendor Registration | <input type="checkbox"/> Analysis | <input type="checkbox"/> Contracts/Master Agreements | |
| <input type="checkbox"/> Vendor Performance Tracking (VPT) | | | |

Identify the impact of the current process in the MyFloridaMarketPlace system.

- ☐ Non-compliance with State Statute. (If so, please list statute in description box below).
- ☐ Cannot use part or all of MyFloridaMarketPlace as planned.
- ☐ Forces us to make significant procedural and/or organizational changes.
- ☐ Less effective in meeting the objective.
- ☐ Decreased efficiency in the use of the system.

CHANGE REQUEST



Describe the Current Process to include job impact (reference additional documentation if necessary):

[Put description here...]

Describe the Change desired (reference additional documentation if necessary):

[Put description here...]

CHANGE REQUEST



Follow-up Necessary:

When this Change Request is reviewed by the Change Review Board, additional questions may be identified. The Change Review Board and/or Project Team will follow-up with the Agency Approver or Primary Contact for this Change Request as needed. Follow-up may be done by phone call or via email. It is very important to answer follow-up questions or provide the additional information requested so that continued action takes place and determinations are made concerning the Change Request.

Primary contact person for follow-up (if not the Agency Approver):
Phone:
Email:
Secondary contact person for follow-up (if not the Requesting User):
Phone:
Email:

This section to be completed by Change Review Board

Change Review Board Prioritization

Date:

Change is useful or necessary:

☐ Yes

☐ No

Requested change priority level:

☐ High

☐ Medium

☐ Low

CR# Assigned (Pivotal):

Comments and/or revisions to the change request:

[Put comments here...]

CHANGE REQUEST



Change Review Board Members:

Name	Agency	Phone
1.		
2.		
3.		
4.		
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10.		
11.		
12.		
13.		

(This section for Operations Support)

Operations Support Detailed Estimate**Date:****Comments and supporting documentation:**

[Put comments here...]

CHANGE REQUEST



(This section for Change Review Board)

Change Review Board Decision (Go/No-Go)

Date:

Change Review Board Go/No-Go Decision:

☐ Go

☐ No-Go

Comments and supporting documentation:

[Put comments here...]

Project Director and Change Review Board Director Approval:

Title	Name
Project Director	
Change Review Board Director	