

☛ **05hr_JC-Au_Misc_pt22k**



☛ Details: Proposed Audit: Information Technology Systems Projects in State Agencies

(FORM UPDATED: 08/11/2010)

WISCONSIN STATE LEGISLATURE ... PUBLIC HEARING - COMMITTEE RECORDS

2005-06

(session year)

Joint

(Assembly, Senate or Joint)

Committee on Audit...

COMMITTEE NOTICES ...

- Committee Reports ... **CR**
- Executive Sessions ... **ES**
- Public Hearings ... **PH**

INFORMATION COLLECTED BY COMMITTEE FOR AND AGAINST PROPOSAL

- Appointments ... **Appt** (w/Record of Comm. Proceedings)
- Clearinghouse Rules ... **CRule** (w/Record of Comm. Proceedings)
- Hearing Records ... bills and resolutions (w/Record of Comm. Proceedings)
 - (**ab** = Assembly Bill) (**ar** = Assembly Resolution) (**ajr** = Assembly Joint Resolution)
 - (**sb** = Senate Bill) (**sr** = Senate Resolution) (**sjr** = Senate Joint Resolution)
- Miscellaneous ... **Misc**

* Contents organized for archiving by: Stefanie Rose (LRB) (October 2012)

Matthews, Pam

From: Frank-Reece, Gina - DOA [Gina.FrankReece@Wisconsin.gov]
Sent: Tuesday, April 25, 2006 8:33 AM
To: Matthews, Pam
Subject: RE: Lint to Matt's presentation...
Follow Up Flag: Follow up
Flag Status: Yellow
Attachments: IBISinformation.doc; PeopleSoft-softwarebackground.doc

Pam - Here is the information I mentioned I would send you regarding ERP/IBIS system and what is happening in other states with the PeopleSoft software.

Let me know if you have any questions.

Gina Frank-Reece

From: Matthews, Pam [mailto:Pam.Matthews@legis.state.wi.us]
Sent: Thursday, April 20, 2006 11:29 AM
To: Frank-Reece, Gina - DOA
Subject: Lint to Matt's presentation...

Hi Gina,

Thank you for coming yesterday and spending the time you did with Sue and I to help us better understand the ACE initiative. As promised, I am sending you the link (<http://www.mediasite.com/Player.aspx?p=9661>) to that presentation I mentioned yesterday. It is approximately 20 minutes.

Also, Sue and I were discussing the meeting some more after you left and we had another question. How does an agency's budget work from the perspective of the loss of FTE's due to consolidation? Is it reduced by the full amount of that FTE's salary? If so, how do they make up in what's left of their budget for the amount that DOA is now charging back to them for their "space/maintenance" portion of the new servers?

Thank you for your patience,
Pam

*Pamela B. Matthews
Research Assistant
Office of Representative Sue Jeskewitz*

*Madison: 608.266.3796
Toll free: 888.529.0024
pam.matthews@legis.state.wi.us*

Background on the 'PeopleSoft Enterprise Solutions' Software

Other state governments that have all or part of PeopleSoft's administrative modules include:

- Montana*
- North Dakota*
- Minnesota
- Missouri*
- Kansas
- Oklahoma*
- New Mexico*
- Texas*
- Indiana*
- Ohio*
- New York
- Vermont*
- Delaware*
- Massachusetts
- Connecticut
- Georgia*
- Florida
- Hawaii

The states with licenses for the full array of modules are identified with an asterisk. The rest have either financials or HR/payroll, but not both. Georgia, Delaware, Indiana and Missouri are states who have mature implementations of at least part of the total array of software.

Locally, the UW, Alliant Energy and MATC all have, or are in the process of, implementing PeopleSoft.



**WISCONSIN DEPARTMENT OF
ADMINISTRATION**

JIM DOYLE
GOVERNOR

STEPHEN E. BABLITCH
SECRETARY

Division of Enterprise Technology
Post Office Box 7844
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April 26, 2006

Like any business, the State of Wisconsin depends on administrative systems to manage finances, personnel, budget and procurement. However the State of Wisconsin's administrative systems are fragmented, incompatible, inconsistent and incomplete. For instance, there are currently more than 38 different HR and payroll systems, more than 59 financial management systems and no enterprise procurement system serving the State of Wisconsin's administrative needs. The effort involved to maintain and reconcile these systems is inefficient, ineffective and very, very costly.

Right now, the State of Wisconsin cannot answer basic questions such as:

- How much do we spend for specific commodities?
- How many people work for the State of Wisconsin?
- How much does the State of Wisconsin spend on Information Technology?
- Does anyone working for the State of Wisconsin have a specific skill?
- Has this vendor performed well on contracts with the State of Wisconsin in the past?

In a broader sense, the State of Wisconsin is unable to adopt best practice solutions to basic business processes. For instance, the following list contains samples of public sector "best practice" standards that are not supported by our current systems:

- NASA – Performance commitments and budget are allocated to portfolios of major projects
- DOT – Compare marginal benefits and marginal costs associated with added or reduced funding
- State Department – Goals and strategies should be cross linked across bureaus
- Office of Federal Procurement – Record contractor performance periodically during course of contract and use data to inform future vendor selection

While the cost to implement and operate an single integrated business information system is high, an independent study estimated that the State of Wisconsin should achieve an internal rate of return (IRR) of approximately 76% over eleven (11) years. The same study recommended that the State of Wisconsin select a full featured Enterprise Resource Planning system (ERP) and purchase the administrative modules.

ERP systems are intended to provide integrated production and capacity management in addition to the integrated administrative systems. In general, they are extremely flexible, fully featured, tightly integrated, single database solutions to producing a unified view of complex organizations. While ERP implementations are somewhat notorious for problems, production management features account for

much of the risk and difficulty. By planning a staggered implementation of administrative systems only, we plan to minimize both cost and risk.

There are a variety of benefits associated with a single instance of an integrated business information system (IBIS) including:

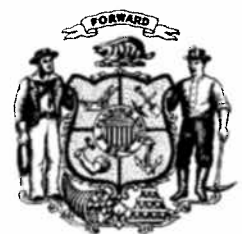
- A significant return on investment (ROI) from replacing fragmented systems with a single, seamless package.
- Single entry for all transaction data into a central database with attendant improvements in reporting capability and accuracy.
- Reduced risk of system collapse and/or obsolescence.
- Web based features providing citizen and vendor self service functionality.
- Employee self service capability to save time and improve accuracy on personnel records.

The IBIS project will be a business driven project. The Department of Administration's Enterprise Technology Division will provide technical resources and project management to support the project. IBIS will require an extremely high degree of commitment and coordination. Change management of various kinds will be critical to the ultimate success of the IBIS.

IBIS represents an opportunity to upgrade the State of Wisconsin's capability to manage and deliver high quality services to our citizens at the lowest possible cost.



WISCONSIN STATE LEGISLATURE



Assembly Colleges and Universities
May 2, 2006
225 Northwest, State Capitol
Donald Mash
UW System Executive Senior Vice President

Appointments, Payroll & Benefits System (APBS) Implementation

Status of implementation issued November 2, 2005:

- UWS to develop and pursue a planning and high level design phase to determine cost and timelines of continuing implementation with Lawson software. Not pursued to date.
- Analyze life span alternatives and costs-to-continue utilizing current legacy system.
Done!
- Await and analyze implications of DOA's selection of a software vendor for its IBIS suite of systems before moving forward with Lawson. Currently analyzing and discussing DOA's selection of Oracle/PeopleSoft for its procurement, shared financials, and HR/payroll systems.

Waukesha Study

- Governor's veto of legislation enabling a merger of UW-Waukesha and UW-Milwaukee resulted in the Governor asking the BOR to study the matter and determine the best course of action.
- President Reilly asked Executive Senior VP Don Mash to lead and coordinate the study and report back to the BOR.
- Executive Senior VP Mash has utilized a UWS Steering Group that has consulted with Waukesha business, government, and community leaders to determine needs and expectations.
- Needs and expectations:

4-year degree programs	Continuing education
Graduate programs	Research presence
- Initial report was given to the BOR in February. It contained a report from Waukesha business community (WCAN) and a letter from County Executive Dan Vrakas.
- Final report and a recommendation will be presented to the BOR at its June meeting in Milwaukee.

Segregated Fee Audit

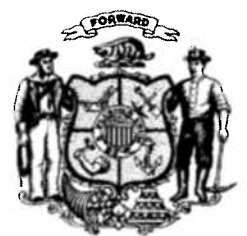
Requested by the BOR's Business, Finance, and Audit committee to include:

- Review of programs and services that segregated fees support.
- Examination of the process for establishing segregated fees.
- Describing the allocation process of segregated fees for major capital projects.
- Analyzing the growth in segregated fees throughout the System.

Will report findings and recommendations to the BOR on May 4.



WISCONSIN STATE LEGISLATURE





WISCONSIN STATE LEGISLATURE

Joint Legislative Audit Committee

Committee Co-Chairs:

State Senator Carol Roessler

State Representative Suzanne Jeskewitz

May 9, 2006

HAND-DELIVERED

Governor Jim Doyle
115 East Capitol
Madison, WI

Secretary Stephen Bablitch
101 East Wilson St., 9th Floor
Madison, WI

Dear Governor Doyle and Secretary Bablitch:

As you know, the Joint Legislative Audit Committee approved an audit by the nonpartisan Legislative Audit Bureau (LAB) of information technology (IT) system contract management statewide on April 5, 2006. The LAB will not complete the audit until sometime in early 2007.

In the interim, we are requesting that you immediately implement the best practices outlined by the LAB in their March 2001 Review of State Agency Use of Computer Consultants. The LAB's review looked at project management and IT contract management literature to provide the state some guidance for managing IT projects in areas such as "selecting between fixed-price and hourly contracts, communicating system requirements to the contractor, using modular contracting to minimize problems caused by program changes, and managing contractors."

The best practices outlined are very reasonable. In fact, they would dovetail quite nicely with the recommendations made by Mark Bugher. We have enclosed a copy of the LAB's review for your convenience.

We also want to encourage you to reach out and tap the wealth of knowledge Wisconsin citizens have to offer for improving the State's IT contracting process. We continue to be approached, in person, by phone and by e-mail from concerned citizens statewide who want to offer their thoughts and suggestions. This could be done through a citizen advisory group.

SENATOR ROESSLER
P.O. Box 7882 • Madison, WI 53707-7882
(608) 266-5300 • Fax (608) 266-0423

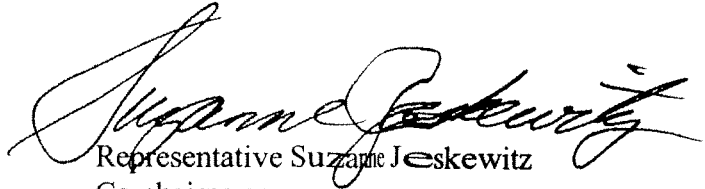
REPRESENTATIVE JESKEWITZ
P.O. Box 8952 • Madison, WI 53708-8952
(608) 266-3796 • Fax (608) 282-3624

We all expect our tax dollars to be spent wisely and we believe that these are two practical courses of action to take as we await the completion of the LAB's audit. We look forward to your timely response to this letter.

Sincerely,



Senator Carol A. Roessler
Co-chairperson



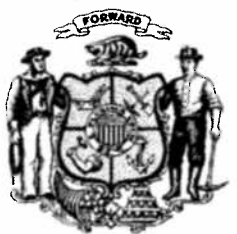
Representative Suzanne Jeskewitz
Co-chairperson

Enclosure

Cc: Janice Mueller, State Auditor
Mark Bugher, Director of University Research Park



WISCONSIN STATE LEGISLATURE



Matthews, Pam

From: Handrick, Diane
Sent: Tuesday, June 13, 2006 1:39 PM
To: Matthews, Pam
Subject: FW: Flash Back--It's a Quality Problem
Follow Up Flag: Follow up
Flag Status: Blue

Have not sent this to anyone but you

From: Jerry Miller [mailto:gmill@ptwi.net]
Sent: Tuesday, June 13, 2006 9:40 AM
To: Mueller, Janice
Cc: Frank-Reece, Gina - DOA; Jeskewitz, Suzanne
Subject: Flash Back--It's a Quality Problem

Janice, yesterday I received a catalog from Learning Tree International a provider of training for management and computer professionals. It reminded me of the on-going quest to identify why State's agencies have trouble purchasing and implementing systems that work after installation. Knowing that the state has no professional Quality Assurance program I recommend that you and/or a senior member at DOA attend the Learning Tree's Software Quality Assurance seminar (course 312), before generating the audit results in the fall. You can learn more about this seminar at www.learningtree.com. I believe the course will provide insight on the impact of Quality Assurance, in developing and/or purchasing trouble free software.

Hopefully I will receive no more mail that reminds me of problems that I left behind and, therefore, you will receive no more email with suggestions that may or may not have merit.

Good Luck on your quest!.

Gerrald F. Miller

W7958 Hyw B
Lake Mills, WI 53551

-----Original Message-----

From: Jerry Miller [mailto:gmill@ptwi.net]
Sent: Tuesday, May 16, 2006 11:18 AM
To: 'janice.mueller@legis.state.wi.us'
Cc: 'gina.frank-reece@doa.state.wi.us'; 'suzanne.jeskewitz@legis.state.wi.us'
Subject: Quality Assurance and State project failures
Importance: High

Before retiring, I accumulated over 40 years in the computer industry. During that time, I held many positions in hardware and software design, Quality Assurance and many senior management positions including VP of Development and VP of Operations in the private sector. The last 12 years of my employment were spent in state service at DHFS, the Lottery and DOR.

Janice, I respectfully disagree with a statement you made recently in the press, "*Mueller said that she doubted auditors would find any commonality between projects, except that few are on time and on budget*".

06/14/2006

As the audit unravels software project problems, you will find a common thread that wraps it's way through most if not all state agencies. That is, no Software Quality Assurance (SQA) organizations or knowledge. Not Quality Control, but **Quality Assurance**. From my experience at DOR I can say without reservation that DOR and the Lottery, did/does not have a Quality Assurance organization, nor do they understand the benefits of Software Quality Assurance. DHFS had something called Quality Assurance which had no influence over the development cycle. There is a Chapter of the national Software Quality Assurance organization in Madison. You will find that the State, the largest computer user in Madison, has no members in this excellent organization, while virtually all private sector companies have SQA organizations that attend these meetings.

Being a taxpayer living on a fixed income I can only hope that the audit identifies the common threads, such as lack of SQA. that contribute to system failures and high costs that plague state system development efforts.

Respectfully submitted

Gerald F. Miller

W7958 Hyw B
Lake Mills, WI 53551



WISCONSIN STATE LEGISLATURE



Matthews, Pam

From: Matthews, Pam
Sent: Tuesday, August 22, 2006 3:45 PM
To: Matthews, Pam
Subject: Learn from UW software debacle

Learn from UW software debacle

Wisconsin State Journal editorial
August 21, 2006

The University of Wisconsin System cannot afford another \$26-million mistake.

Neither can the state's taxpayers.

That is why System executives should not quickly put their failed payroll-and-benefits management project behind them. They should keep the embarrassing and costly episode right in front of them, so they can remind themselves of what went wrong.

They need to ensure that it goes right next time.

System executives deserve credit for accepting responsibility for the mess they made of an attempt to install a state-of-the-art system to manage payroll, benefits and other human relations data throughout all System campuses.

The project cost \$26 million before it was canceled last month, five years after it started.

Ed Meachan, the System's chief information officer, admitted the affair was "a major, major failure on our part."

The System now plans to limp along with its current payroll-and-benefits system until it can start over on a major upgrade.

Anyone who has been involved with an effort to install improved software at a workplace can appreciate what happened to the UW System. Disasters are all too common.

However, while the frequency of similar trouble puts the UW

08/23/2006

problem in context, it does not excuse the mistakes the System made.

After all, the \$26 million the System wasted could have paid tuition and fees for nearly 1,000 in-state students to attend UW-Madison for four years. Moreover, the waste of \$26 million undermines support in the Legislature and among taxpayers for the System's future budget proposals.

State auditors have started to review the UW project as part of an examination of information technology problems across state government. System executives should pay close attention to that review when it is completed. Meantime, some lessons are already apparent.

- For information technology questions, listen to information technology experts.

The System's human resources executives and information technology executives were at odds from the start.

George Brooks, who has since retired as the System's associate vice president for human resources, deserves much of the blame. Brooks put end-users of the software, rather than information technology experts, in charge. Poor decisions and infighting ensued.

- Value experience.

The project manager, selected by Brooks, was inexperienced. Margo Lessard even admitted she was in over her head.

- Hire outside experts skilled in handling software upgrade projects.

System executives underestimated the complexity of the process. Incomplete planning led to poor testing of software and rough transitions from one phase of the project to the next. Cost overruns resulted.

System executives now plan to take advantage of a larger state effort to revamp software. The System expects to join in on a state contract with Oracle PeopleSoft, allowing the System to get a discounted rate to make another try at installing a state-of-the-art human resources management system.

This Plan B makes sense - but only if System executives

- learn and apply the lessons of their Plan A debacle.

Return to story

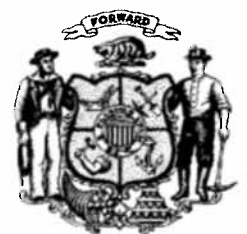
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WISCONSIN STATE LEGISLATURE



SHARED INFORMATION SERVICES

WEEKLY UPDATE (DRAFT)

VOLUME 2, ISSUE 10

MARCH 8, 2006

Summary of Activities

Agency Rollout

- Continued to perform detailed migration planning with 9 agencies. Preparing environment to begin to bring initial servers in for testing. Continuing to refine the overall consolidation schedule and finalize agency profiles. Refining staffing for implementation and data center receiving teams.

Organization

- Continued with activities related to hiring for the new organization. Working with RMS Team to scope/implement mandatory changes to RMS. Working to publish billing/pricing FAQ list. Developing front-end billing system and planning interim billing steps. Transitioning on-going maintenance of organization activities to DET.

Support Tools

- Completed initial requirements and evaluations for all support tools initially identified. Working with DET Operations to prioritize critical solution areas and refine the plans. Continuing to prepare for procuring the server & DB backup/restore solution and IP address management.

Data Center

- Continuing to build new facility. Working on rack layout and structured wiring, as well as move coordination to the new facility.

Security

- Completed RVA for Commerce and continued to work on RVA's for OST and DOC. Continued to prepare for future RVA's, and review RVA results with agencies.

Server

- Preparing to setup and implement storage management services. Continuing to refine the backup solution. Preparing servers to setup the directory environment. Testing the new KVM system. Finalizing testing for anti-virus solution. Working to finalize recommendation for image and OS mgmt solution.

Database

- Continued to implement clustering for Oracle 9i in Isolated Test. Working to configure hardware replacements for SQL Server Enterprise. Continued to develop standards and procedures.

Network

- Developing plan to migrate to new security perimeter design. Developing framework for analysis of data for SIS and Enterprise LAN services.

Operations Support

- Working on isolated lab builds. Working with SVRS team to resolve HPOV monitoring issues. Began planning to move HPOV to new SIS environment. Continued planning/development of revised milestones.

Application Hosting

- Working to complete Websphere design/standards documentation for WEAT and build directory servers in Isolated Test environment.

Desktop

- Helping prepare desktops for test environments.

Email

- Continuing to replan to accommodate the shift in the email platform.



Key Milestone Dates

Milestone	Start	End	Cmpl
On-Site Agency Reviews	1/31	4/29	4/25
Initial Agency Profiles	4/15	7/31	8/23
Initial Consolidation Schedule	8/1	1/15/06	1/13
Physical Consolidations - Wave 1	12/16	6/30/06	
Physical Consolidations - Wave 2	7/1/06	6/30/07	
Pricing Finalized	2/7	6/30	7/7
Service Offering Definition Complete	1/10	8/15	8/8
Initial Processes Complete	5/1	12/31	12/20
Hire and orient staff in new DET org	8/1	4/30/06	
Email Agency Migrations		tbd	

Other Important Dates

- ✓ **Mar IOC Meetings (10-11:30am):**
Mar 15 (St Croix), 22, 29
- ✓ **Mar IOC Technical Meetings (1-2pm):**
Mar 8 (DOA 8G), 15, 22, 29

Agency Rollout Status

Profile & Rollout Plan Presented to Agencies	25 / 26
Follow-up Planning Meeting Complete	24 / 26
Profile/Rollout Plan Finalized	17 / 26
Agency Implementation Kickoff Complete	9 / 26
Agency Preparation Complete	0 / 26
Agency Implementation Complete	0 / 26

Support Tools Status

Requirements/Validation	23 / 23
Evaluation	23 / 23
Recommendation Approved	7 / 23
Procurement	4 / 23
Testing & Configuration	1 / 23
Production Preparation	1 / 23

Shared Information Services Objectives

- More effectively deploy information services
- Maintain or improve service levels
- Reduce capital acquisition costs
- Reduce on-going operational costs

Across the state of Wisconsin...

SHARED INFORMATION SERVICES INITIATIVE

Key Milestones/Deliverables

March 8, 2006

Ref	Milestones / Deliverables	Dates			Status*	G/Y/R
		Original Planned Start	Original Planned Complete	Revised Complete		
Agency Rollout (Joe Rueden/Doug Schrock/Alicia Antonetti)						
1	PLAN - Develop Initial Agency Profiles & Rollout Schedule	4/15/2005	7/31/2005	9/30/2005	9/29/2005 Complete	Green
2	PLAN - Review & finalize initial rollout schedule	7/11/2005	1/16/2006		1/13/2006 Complete	Green
3	PLAN - Finalize agency profile data & documentation	7/11/2005	3/17/2006		On Track	Green
4	ROLLOUT - Initial Mig Checklists/Plans in place to begin consol.	6/27/2005	1/13/2006		1/13/2006 Complete	Green
5	ROLLOUT - Final Migration Checklists/Tool in place	1/13/2006	3/17/2006		On Track	Green
6	ROLLOUT - Wave 1 Rollout	12/16/2005	6/30/2006		Delayed	Yellow
7	ROLLOUT - Wave 2 Rollout	6/1/2006	6/30/2007		On Track	Green
Organization (Joe Rueden/Kevin Ohl)						
8	Validate RMS & Web Interfaces Readiness for Support	8/1/2005	2/28/2006	tbd	Delayed	Yellow
9	Initial Hiring (Team Leads & Staff) approx 24 FTE's	9/15/2005	3/15/2006		At Risk	Yellow
10	Remaining Hires (Team Leads & Staff) approx 34 FTE's	1/1/2006	4/30/2006		At Risk	Yellow
11	Develop DET/Agency Staff Transition Plan	1/1/2006	3/15/2006		At Risk	Yellow
12	Orientation Modules Created (Prep)	9/15/2005	2/6/2006		2/6/2006 Complete	Green
13	Orientation (Org Awareness & Svc Delivery)	2/6/2006	3/31/2006	4/30/2006	At Risk	Yellow
14	Finalize Storage Billing Processes	9/15/2005	2/3/2006	3/15/2006	At Risk	Yellow
15	Develop standard aggregate agency MOU for SIS services	1/1/2006	2/17/2006	3/24/2006	Delayed	Green
16	Billing: Develop, Test, Implement SIS Billing System	9/15/2005	3/31/2006	5/31/2006	At Risk	Yellow
Support Tools (Mark Sawicki/David Clark)						
Milestones/dates in progress						
17	Revise support tools plans for high priority solution areas		3/17/2006		On Track	Green
New Data Center (John Ritchie/Jackie Ramin/David Clark)						
18	Building enclosed		12/21/2005		12/19/2005 Complete	Green
19	Interior Walls		2/15/2006		2/15/2006 Complete	Green
20	Systems Installation		3/1/2006	3/15/2006	On Track	Green
21	Commissioning		4/3/2006		On Track	Green
22	Build out coordination complete		5/30/2006		On Track	Green
23	Technical Moves		5/31/2006		On Track	Green
24	Staff Move		6/30/2006		On Track	Green
25	Determine equipment/rack layout in new Data Center		3/3/2006		Delayed	Yellow
26	Determine structured wiring requirements		3/10/2006		On Track	Green
27	Order racks, patch panels & power strips for new Data Center		3/10/2006		On Track	Green
28	Equipment migration from existing to new Data Center	4/1/2006	tbd		On Track	Green
Security (Mike Lettman/Rob Keis/David Clark)						
29	Wave 1 - Perform RVA's & Remediation	1/16/2006	6/30/2006		On Track	Green
30	Wave 2 - Perform RVA's & Remediation	5/1/2006	4/1/2007		On Track	Green
31	Implement/Configure Intrusion Detection System (MARS)	1/1/2006	5/31/2006		On Track	Green
32	Implement/Configure Intrusion Prevention System (CSA)	1/1/2006	5/31/2006		On Track	Green
33	Data Center Security Audit - Initial (Logical & Physical)	7/1/2006	9/30/2006		On Track	Green
34	Data Center Security Audit - Remediation by DET	10/1/2006	3/31/2007		On Track	Green
Email Upgrade/Rollout (Raffi Mesdijan/Trina Zanow)						
35	Develop initial plans for Exchange upgrade		3/10/2006		On Track	Green
a. Infrastructure Support: Server (Mike Averill)						
Milestones/dates in progress						
36	Designs/Std's: High Priority	1/3/2006	2/15/2006	tbd	On Track	Green
37	Designs/Std's: Medium Priority	1/17/2006	tbd		On Track	Green
38	Processes & Procedures: High Priority	1/3/2006	tbd		On Track	Green
39	Lab Management Preparation	1/23/2006	3/13/2006		On Track	Green
40	Server Builds: High Priority	11/1/2005	1/20/2006		Complete	Green
41	Base Builds	11/1/2005	2/3/2006		On Track	Green
Environment Prep - HIGH Priority						
42	Equipment Acquisition	10/3/2005	2/9/2006	tbd	On Track	Green
44	Network Prep: Isolated Test (e.g. racks, blade ctr, etc)	10/3/2005	2/28/2006		On Track	Green
43	Build & Configure Servers: Isolated Test	1/9/2006	3/1/2006		On Track	Green
45	Build & Configure Servers: Prod	2/6/2006	3/15/2006		On Track	Green
46	Build & Configure Servers: UAT	2/15/2006	4/25/2006		On Track	Green
47	Build & Configure Servers: Load Test		tbd		On Track	Green
48	Build & Configure Servers: Dev	4/3/2006	4/25/2006		On Track	Green
Environment Prep - MEDIUM Priority						
49	Build & Configure Servers: Dev	2/15/2006	4/4/2006		On Track	Green
50	Build & Configure Servers: UAT	2/15/2006	4/21/2006		On Track	Green
51	Build & Configure Servers: Isolated Test	2/15/2006	4/25/2006		On Track	Green
52	Build & Configure Servers: Prod	2/14/2006	4/25/2006		On Track	Green
53	Build & Configure Servers: Training		tbd		On Track	Green

SHARED INFORMATION SERVICES INITIATIVE

Key Milestones/Deliverables

March 8, 2006

Ref	Milestones / Deliverables	Dates			Status*	G/Y/R
		Original Planned Start	Complete	Revised Complete		
b. Infrastructure Support: Database (Amy Dustin)		Milestones/dates in progress				
54	Complete Standards, Best Practices & Procedures	2/23/2006	tbd		On Track	Green
55	Complete Database Build Documentation	1/30/2006	tbd		On Track	Green
Environment Prep						
56	Build & Configure Servers: Isolated Test	1/30/2006	tbd		On Track	Green
57	Build & Configure Servers: Dev	2/22/2006	tbd		On Track	Green
58	Build & Configure Servers: UAT	3/1/2006	tbd		On Track	Green
59	Build & Configure Servers: Prod		tbd		On Track	Green
60	Build & Configure Servers: Load Test		tbd		On Track	Green
c. Infrastructure Support: Network (Jan Schnelder)						
Current Data Center Build-Out						
61	Current DC: Build Isolated Test Env.	12/6/2005	1/26/2006		1/26/2006 Complete	Green
62	Current DC: Build UAT Env.	1/10/2006	2/24/2006	3/10/2006	Delayed	Yellow
63	Current DC: Build Production Env.	2/6/2006	2/24/2006	3/10/2006	Delayed	Yellow
64	Current DC: Build Training/Staging Env.	3/1/2006	3/31/2006		On Track	Green
New Data Center Build-Out						
65	New DC: Build Isolated Test Env.		tbd		Complete	Green
66	New DC: Build UAT Env.		tbd		On Track	Green
67	New DC: Build Production Env.		tbd		On Track	Green
68	New DC: Build Training/Staging Env.		tbd		On Track	Green
69	LAN Migration Milestones - TBD...		tbd		On Track	Green
Agency WAN Connectivity						
70	Giga MadMAN	7/11/2005	4/30/2006		On Track	Green
71	Badgernet Converged Network	10/26/2005	6/30/2006		On Track	Green
Enterprise LAN Services						
72	Hire & Train	1/3/2006	4/15/2006		On Track	Green
73	Understand Existing Support Model	2/1/2006	3/31/2006		On Track	Green
74	Define New Support Model	3/1/2006	4/30/2006		On Track	Green
75	Cisco 2811 Router Installations	8/11/2005	6/30/2006		On Track	Green
d. Infrastructure Support: Ops Support (Lisa Onken)		Milestones/dates in progress				
75	Designs/Stdts: Medium Priority	2/7/2006	2/21/2006	tbd	Delayed	Yellow
76	Setup NOC & define/document Ops roles	2/28/2006	3/8/2006		On Track	Green
77	Processes & Procedures: Medium Priority	3/15/2006	4/25/2006		On Track	Green
78	Define/document Ops roles: Medium Priority	2/28/2006	6/6/2006		On Track	Green
79	Ops Builds: High Priority	1/25/2006	2/20/2006		2/28/2006 Complete	Green
80	Build & Configure Servers: Isolated Test - High Priority	1/25/2006	2/24/2006	tbd	Delayed	Yellow
81	Config Mgmt (Tactical): Data elements identified	1/24/2006	2/6/2006	tbd	Delayed	Yellow
82	Config Mgmt (Tactical): Technology in place	2/7/2006	2/27/2006	tbd	Delayed	Yellow
83	Config Mgmt (Tactical): Processes & Procedures in place	2/28/2006	3/13/2006		On Track	Green
84	Config Mgmt (Strategic): Verify req & complete solicitation	6/30/2006	9/7/2006		On Track	Green
85	Config Mgmt (Strategic): Setup test lab & execute test plan	10/20/2006	11/9/2006		On Track	Green
86	Config Mgmt (Strategic): Develop implementation plan	11/10/2006	11/16/2006		On Track	Green
87	HPOV Network Monitor: Monitor all DOA network devices	1/17/2006	2/27/2006	tbd	Delayed	Yellow
88	HPOV Network Monitor: Develop auto alerts for Operations	2/28/2006	3/20/2006		On Track	Green
89	HPOV Network Monitor: Verify performance metrics functionality	3/21/2006	4/10/2006		On Track	Green
90	HPOV Network Monitor: Monitor remote CISCO 2811 routers	2/28/2006	7/3/2006		On Track	Green
91	HPOV: Agents on all DOA Servers	1/10/2006	1/31/2006	2/27/2006	2/24/2006 Complete	Green
92	HPOV: Integration with support tools	2/9/2006	3/2/2006	tbd	Delayed	Yellow
93	HPOV: Cutover to HPOV for monitoring	2/28/2006	3/14/2006		On Track	Green
94	HPOV: Develop auto alerts for Operations	2/28/2006	3/20/2006		On Track	Green
95	HPOV: Training - Operations Monitoring Team	2/28/2006	3/21/2006		On Track	Green
96	HPOV: Redundant direct paging	3/15/2006	3/28/2006		On Track	Green
97	HPOV: Authentication & Delegated Admin	2/28/2006	3/28/2006		On Track	Green
98	HPOV: Define process for monitoring all agency assets	2/28/2006	4/25/2006		On Track	Green
e. Infrastructure Support: Application Hosting (Trina Zanow)						
99	Designs/Stdts: Websphere		2/28/2006	tbd	Delayed	Yellow
100	Citrix Build Documentation		2/28/2006	tbd	Delayed	Yellow
101	IIS Build Documentation		2/28/2006	tbd	Delayed	Yellow
Environment Prep - HIGH Priority						
102	Build & Configure Directory Servers: Isolated Test		2/28/2006	tbd	Delayed	Yellow
103	Move UAT app servers into preferred area for SIS		3/15/2006		On Track	Green
104	Move Prod app servers into preferred area for SIS		3/15/2006		On Track	Green
f. Infrastructure Support: Desktop (Cheryl Hoffman)						
105	Setup desktops for Isolated Test env.	3/13/2006	3/31/2006		On Track	Green
106	Complete desktop awareness plan	3/7/2006	4/21/2006		On Track	Green
107	Complete workstations for DET staff at DOA	2/22/2006	5/15/2006		On Track	Green

SHARED INFORMATION SERVICES INITIATIVE**Key Milestones/Deliverables**

March 8, 2006

Ref	Milestones / Deliverables	Dates			Status*	G/Y/R
		Original Start	Planned Complete	Revised Complete		
108	Complete workstations for DET staff at the new data center	2/22/2006	5/15/2006		On Track	

SHARED INFORMATION SERVICES INITIATIVE

Key Milestones/Deliverables

March 8, 2006

Ref	Milestones / Deliverables	Dates			Status*	G/Y/R
		Original Start	Planned Complete	Revised Complete		
Agency Rollout (Joe Rueden/Doug Schrock/Alicia Antonetti)						
1	PLAN - Develop Initial Agency Profiles & Rollout Schedule	4/15/2005	7/31/2005	9/30/2005	9/29/2005	Complete Green
2	PLAN - Review & finalize initial rollout schedule	7/11/2005	1/16/2006		1/13/2006	Complete Green
3	PLAN - Finalize agency profile data & documentation	7/11/2005	3/17/2006			On Track Green
4	ROLLOUT - Initial Mig Checklists/Plans in place to begin consol.	6/27/2005	1/13/2006		1/13/2006	Complete Green
5	ROLLOUT - Final Migration Checklists/Tool in place	1/13/2006	3/17/2006			On Track Green
6	ROLLOUT - Wave 1 Rollout	12/16/2005	6/30/2006			Delayed Yellow
7	ROLLOUT - Wave 2 Rollout	6/1/2006	6/30/2007			On Track Green
Organization (Joe Rueden/Kevin Ohi)						
8	Validate RMS & Web Interfaces Readiness for Support	8/1/2005	2/28/2006	tdb		Delayed Yellow
9	Initial Hiring (Team Leads & Staff) approx 24 FTE's	9/15/2005	3/15/2006			At Risk Yellow
10	Remaining Hires (Team Leads & Staff) approx 34 FTE's	1/1/2006	4/30/2006			At Risk Yellow
11	Develop DET/Agency Staff Transition Plan	1/1/2006	3/15/2006			At Risk Yellow
12	Orientation Modules Created (Prep)	9/15/2005	2/6/2006		2/6/2006	Complete Green
13	Orientation (Org Awareness & Svc Delivery)	2/6/2006	3/31/2006	4/30/2006		At Risk Yellow
14	Finalize Storage Billing Processes	9/15/2005	2/3/2006	3/15/2006		At Risk Yellow
15	Develop standard aggregate agency MOU for SIS services	1/1/2006	2/17/2006	3/24/2006		Delayed Green
16	Billing: Develop, Test, Implement SIS Billing System	9/15/2005	3/31/2006	5/31/2006		At Risk Yellow
Support Tools (Mark Sawicki/David Clark)						
Milestones/dates in progress						
17	Revise support tools plans for high priority solution areas		3/17/2006			On Track Green
New Data Center (John Ritchie/Jackie Ramin/David Clark)						
18	Building enclosed		12/21/2005		12/19/2005	Complete Green
19	Interior Walls		2/15/2006		2/15/2006	Complete Green
20	Systems Installation		3/1/2006	3/15/2006		On Track Green
21	Commissioning		4/3/2006			On Track Green
22	Build out coordination complete		5/30/2006			On Track Green
23	Technical Moves		5/31/2006			On Track Green
24	Staff Move		6/30/2006			On Track Green
25	Determine equipment/rack layout in new Data Center		3/3/2006			Delayed Yellow
26	Determine structured wiring requirements		3/10/2006			On Track Green
27	Order racks, patch panels & power strips for new Data Center		3/10/2006			On Track Green
28	Equipment migration from existing to new Data Center	4/1/2006	tdb			On Track Green
Security (Mike Lettman/Rob Kels/David Clark)						
29	Wave 1 - Perform RVA's & Remediation	1/16/2006	6/30/2006			On Track Green
30	Wave 2 - Perform RVA's & Remediation	5/1/2006	4/1/2007			On Track Green
31	Implement/Configure Intrusion Detection System (MARS)	1/1/2006	5/31/2006			On Track Green
32	Implement/Configure Intrusion Prevention System (CSA)	1/1/2006	5/31/2006			On Track Green
33	Data Center Security Audit - Initial (Logical & Physical)	7/1/2006	9/30/2006			On Track Green
34	Data Center Security Audit - Remediation by DET	10/1/2006	3/31/2007			On Track Green
Email Upgrade/Rollout (Raffi Mesdjian/Trina Zanow)						
35	Develop initial plans for Exchange upgrade		3/10/2006			On Track Green
a. Infrastructure Support: Server (Mike Averill)						
Milestones/dates in progress						
36	Designs/Std's: High Priority	1/3/2006	2/15/2006	tdb		On Track Green
37	Designs/Std's: Medium Priority	1/17/2006	tdb			On Track Green
38	Processes & Procedures: High Priority	1/3/2006	tdb			On Track Green
39	Lab Management Preparation	1/23/2006	3/13/2006			On Track Green
40	Server Builds: High Priority	11/1/2005	1/20/2006			Complete Green
41	Base Builds	11/1/2005	2/3/2006			On Track Green
Environment Prep - HIGH Priority						
42	Equipment Acquisition	10/3/2005	2/9/2006	tdb		On Track Green
44	Network Prep: Isolated Test (e.g. racks, blade ctr, etc)	10/3/2005	2/28/2006			On Track Green
43	Build & Configure Servers: Isolated Test	1/9/2006	3/1/2006			On Track Green
45	Build & Configure Servers: Prod	2/6/2006	3/15/2006			On Track Green
46	Build & Configure Servers: UAT	2/15/2006	4/25/2006			On Track Green
47	Build & Configure Servers: Load Test		tdb			On Track Green
48	Build & Configure Servers: Dev	4/3/2006	4/25/2006			On Track Green
Environment Prep- MEDIUM Priority						
49	Build & Configure Servers: Dev	2/15/2006	4/4/2006			On Track Green
50	Build & Configure Servers: UAT	2/15/2006	4/21/2006			On Track Green
51	Build & Configure Servers: Isolated Test	2/15/2006	4/25/2006			On Track Green
52	Build & Configure Servers: Prod	2/14/2006	4/25/2006			On Track Green
53	Build & Configure Servers: Training		tdb			On Track Green

SHARED INFORMATION SERVICES INITIATIVE

Key Milestones/Deliverables

March 8, 2006

Ref	Milestones / Deliverables	Dates			Status*	G/Y/R
		Original Planned Start	Original Planned Complete	Revised Complete		
b. Infrastructure Support: Database (Amy Dustin)						
Milestones/dates in progress						
54	Complete Standards, Best Practices & Procedures	2/23/2006		tbd	On Track	Green
55	Complete Database Build Documentation	1/30/2006		tbd	On Track	Green
Environment Prep						
56	Build & Configure Servers: Isolated Test	1/30/2006		tbd	On Track	Green
57	Build & Configure Servers: Dev	2/22/2006		tbd	On Track	Green
58	Build & Configure Servers: UAT	3/1/2006		tbd	On Track	Green
59	Build & Configure Servers: Prod			tbd	On Track	Green
60	Build & Configure Servers: Load Test			tbd	On Track	Green
c. Infrastructure Support: Network (Jan Schnelder)						
Current Data Center Build-Out						
61	Current DC: Build Isolated Test Env.	12/6/2005	1/26/2006		1/26/2006 Complete	Green
62	Current DC: Build UAT Env.	1/10/2006	2/24/2006	3/10/2006	Delayed	Yellow
63	Current DC: Build Production Env.	2/6/2006	2/24/2006	3/10/2006	Delayed	Yellow
64	Current DC: Build Training/Staging Env.	3/1/2006	3/31/2006		On Track	Green
New Data Center Build-Out						
65	New DC: Build Isolated Test Env.			tbd	Complete	Green
66	New DC: Build UAT Env.			tbd	On Track	Green
67	New DC: Build Production Env.			tbd	On Track	Green
68	New DC: Build Training/Staging Env.			tbd	On Track	Green
69	LAN Migration Milestones - TBD...			tbd	On Track	Green
Agency WAN Connectivity						
70	Giga MadMAN	7/11/2005	4/30/2006		On Track	Green
71	Badgermet Converged Network	10/26/2005	6/30/2006		On Track	Green
Enterprise LAN Services						
72	Hire & Train	1/3/2006	4/15/2006		On Track	Green
73	Understand Existing Support Model	2/1/2006	3/31/2006		On Track	Green
74	Define New Support Model	3/1/2006	4/30/2006		On Track	Green
75	Cisco 2811 Router Installations	8/11/2005	6/30/2006		On Track	Green
d. Infrastructure Support: Ops Support (Lisa Onken)						
Milestones/dates in progress						
75	Designs/Stdts: Medium Priority	2/7/2006	2/21/2006	tbd	Delayed	Yellow
76	Setup NOC & define/document Ops roles	2/28/2006	3/8/2006		On Track	Green
77	Processes & Procedures: Medium Priority	3/15/2006	4/25/2006		On Track	Green
78	Define/document Ops roles: Medium Priority	2/28/2006	6/8/2006		On Track	Green
79	Ops Builds: High Priority	1/25/2006	2/20/2006		2/28/2006 Complete	Green
80	Build & Configure Servers: Isolated Test - High Priority	1/25/2006	2/24/2006	tbd	Delayed	Yellow
81	Config Mgmt (Tactical): Data elements identified	1/24/2006	2/6/2006	tbd	Delayed	Yellow
82	Config Mgmt (Tactical): Technology in place	2/7/2006	2/27/2006	tbd	Delayed	Yellow
83	Config Mgmt (Tactical): Processes & Procedures in place	2/28/2006	3/13/2006		On Track	Green
84	Config Mgmt (Strategic): Verify req & complete solicitation	6/30/2006	9/7/2006		On Track	Green
85	Config Mgmt (Strategic): Setup test lab & execute test plan	10/20/2006	11/9/2006		On Track	Green
86	Config Mgmt (Strategic): Develop implementation plan	11/10/2006	11/16/2006		On Track	Green
87	HPOV Network Monitor: Monitor all DOA network devices	1/17/2006	2/27/2006	tbd	Delayed	Yellow
88	HPOV Network Monitor: Develop auto alerts for Operations	2/28/2006	3/20/2006		On Track	Green
89	HPOV Network Monitor: Verify performance metrics functionality	3/21/2006	4/10/2006		On Track	Green
90	HPOV Network Monitor: Monitor remote CISCO 2811 routers	2/28/2006	7/3/2006		On Track	Green
91	HPOV: Agents on all DOA Servers	1/10/2006	1/31/2006	2/27/2006	2/24/2006 Complete	Green
92	HPOV: Integration with support tools	2/9/2006	3/2/2006	tbd	Delayed	Yellow
93	HPOV: Cutover to HPOV for monitoring	2/28/2006	3/14/2006		On Track	Green
94	HPOV: Develop auto alerts for Operations	2/28/2006	3/20/2006		On Track	Green
95	HPOV: Training - Operations Monitoring Team	2/28/2006	3/21/2006		On Track	Green
96	HPOV: Redundant direct paging	3/15/2006	3/28/2006		On Track	Green
97	HPOV: Authentication & Delegated Admin	2/28/2006	3/28/2006		On Track	Green
98	HPOV: Define process for monitoring all agency assets	2/28/2006	4/25/2006		On Track	Green
e. Infrastructure Support: Application Hosting (Trina Zanow)						
99	Designs/Stdts: Websphere		2/28/2006	tbd	Delayed	Yellow
100	Citrix Build Documentation		2/28/2006	tbd	Delayed	Yellow
101	IIS Build Documentation		2/28/2006	tbd	Delayed	Yellow
Environment Prep - HIGH Priority						
102	Build & Configure Directory Servers: Isolated Test		2/28/2006	tbd	Delayed	Yellow
103	Move UAT app servers into preferred area for SIS		3/15/2006		On Track	Green
104	Move Prod app servers into preferred area for SIS		3/15/2006		On Track	Green
f. Infrastructure Support: Desktop (Cheryl Hoffman)						
105	Setup desktops for Isolated Test env.	3/13/2006	3/31/2006		On Track	Green
106	Complete desktop awareness plan	3/7/2006	4/21/2006		On Track	Green
107	Complete workstations for DET staff at DOA	2/22/2006	5/15/2006		On Track	Green

SHARED INFORMATION SERVICES INITIATIVE**Key Milestones/Deliverables**

March 8, 2006

Ref	Milestones / Deliverables	Dates			Status*	G/Y/R
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108	Complete workstations for DET staff at the new data center	2/22/2006	5/15/2006		On Track	

SHARED INFORMATION SERVICES

WEEKLY UPDATE (DRAFT)

Summary of Activities

Agency Rollout

- Continued to perform detailed migration planning with 9 agencies. Preparing environment to begin to bring initial servers in for testing. Continuing to refine the overall consolidation schedule and finalize agency profiles. Refining staffing for implementation and data center receiving teams.

Organization

- Continued with activities related to hiring for the new organization. Working with RMS Team to scope/implement mandatory changes to RMS. Working to publish billing/pricing FAQ list. Developing front-end billing system and planning interim billing steps. Transitioning on-going maintenance of organization activities to DET.

Support Tools

- Completed initial requirements and evaluations for all support tools initially identified. Working with DET Operations to prioritize critical solution areas and refine the plans. Continuing to prepare for procuring the server & DB backup/restore solution and IP address management.

Data Center

- Continuing to build new facility. Working on rack layout and structured wiring, as well as move coordination to the new facility.

Security

- Completed RVA for Commerce and continued to work on RVA's for OST and DOC. Continued to prepare for future RVA's, and review RVA results with agencies.

Server

- Preparing to setup and implement storage management services. Continuing to refine the backup solution. Preparing servers to setup the directory environment. Testing the new KVM system. Finalizing testing for anti-virus solution. Working to finalize recommendation for image and OS mgmt solution.

Database

- Continued to implement clustering for Oracle 9i in Isolated Test. Working to configure hardware replacements for SQL Server Enterprise. Continued to develop standards and procedures.

Network

- Developing plan to migrate to new security perimeter design. Developing framework for analysis of data for SIS and Enterprise LAN services.

Operations Support

- Working on isolated lab builds. Working with SVRS team to resolve HPOV monitoring issues. Began planning to move HPOV to new SIS environment. Continued planning/development of revised milestones.

Application Hosting

- Working to complete Websphere design/standards documentation for WEAT and build directory servers in Isolated Test environment.

Desktop

- Helping prepare desktops for test environments.

Email

- Continuing to replan to accommodate the shift in the email platform.



Key Milestone Dates

Milestone	Start	End	Cmpl
On-Site Agency Reviews	1/31	4/29	4/25
Initial Agency Profiles	4/15	7/31	8/23
Initial Consolidation Schedule	8/1	1/15/06	1/13
Physical Consolidations - Wave 1	12/16	6/30/06	
Physical Consolidations - Wave 2	7/1/06	6/30/07	
Pricing Finalized	2/7	6/30	7/7
Service Offering Definition Complete	1/10	8/15	8/8
Initial Processes Complete	5/1	12/31	12/20
Hire and orient staff in new DET org	8/1	4/30/06	
Email Agency Migrations		tbd	

Other Important Dates

- ✓ **Mar IOC Meetings (10-11:30am):**
Mar 15 (St Croix), 22, 29
- ✓ **Mar IOC Technical Meetings (1-2pm):**
Mar 8 (DOA 8G), 15, 22, 29

Agency Rollout Status

Profile & Rollout Plan Presented to Agencies	25 / 26
Follow-up Planning Meeting Complete	24 / 26
Profile/Rollout Plan Finalized	17 / 26
Agency Implementation Kickoff Complete	9 / 26
Agency Preparation Complete	0 / 26
Agency Implementation Complete	0 / 26

Support Tools Status

Requirements/Validation	23 / 23
Evaluation	23 / 23
Recommendation Approved	7 / 23
Procurement	4 / 23
Testing & Configuration	1 / 23
Production Preparation	1 / 23

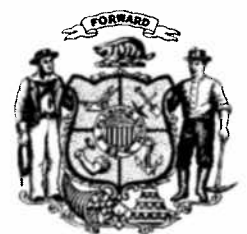
Shared Information Services Objectives

- More effectively deploy information services
- Maintain or improve service levels
- Reduce capital acquisition costs
- Reduce on-going operational costs

Across the state of Wisconsin...



WISCONSIN STATE LEGISLATURE



Areas of concern:

SIS (server consolidation)

E-mail consolidation

IT consultant contracts

HP server contract - rumor

DET Enterprise Technology

DET consolidation projects - SIS and E-mail consolidation -

The process leading to the decision to move forward on these initiatives should be reviewed/audited in the same manner recently applied to the travel contract, for instance:

What was the process?

- Did the process involve a cost/benefit analysis including staff time and money?
- Who was involved in the decision making? What recommendations were made by any group involved in the process?
- Who made the final decision?
- What were the expectations for cost savings and position reductions?
 - Why needed?

After making the decision:

- Who was designated to be responsible for contract compliance?
- How was the project tracked against the initial expectations?
- How are the costs of implementation being tracked?
- These initiatives required position reductions in most state agencies. Post implementation, will agencies have the capacity to meet remaining ongoing IT needs

Possible sources for follow up:

- IT Directors
- ITDC meeting minutes
- 2006 DET Loyalty Survey
- 2004 Summary of Agency Review Comments on Appraisal Documents

ACE Initiative: IT consultant contract:

Several agencies have had contractors replace existing personnel with more expensive individuals.

- Are agencies experiencing cost reductions due to the newly negotiated ACE procurement rules?

Possible sources for followup

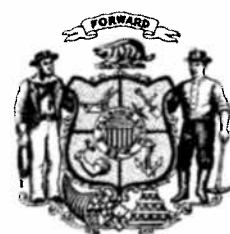
Agency budget directors, Agency IT directors


DET selection and purchase of HP servers for newly built data center –

- What is the dollar value of contract?
- What was the process?
- Who was involved in the decision making?
- What recommendations were made by any group involved in the process?
- Who made the final decision?
- Possible sources for followup: Names/agencies involved in the server evaluation & recommendations.



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Developer of Student, Budgetary and Human Resources Administrative software exclusively for K-12 school districts - public and private.

Our Company's History...

History

On September 1, 1980 Jim King & Associates was founded in Stevens Point, Wisconsin. The owner Jim King, born and raised in Stevens Point, graduated from the University Of Wisconsin Stevens Point in 1968 with a Bachelor's Degree in Mathematics and Economics.

Jim King & Associates first performed custom software and system design services on a consulting basis for a variety of applications. In 1981 an opportunity to develop Personnel/Salary Negotiations software for the Merrill, Wisconsin public schools presented itself. Upon the completion of the software, 50 school districts utilizing hardware systems similar to Merrill were invited to a presentation introducing the new personnel software. Disappointment with the merger turnout at the presentation (three of the 50 school districts attended) was soon overshadowed by the obvious success of the presentation. All three districts that attended seized the opportunity to own the powerful and innovative software package.

From this modest, yet definitive start Jim King & Associates continued to develop powerful software tools for schools. Those tools included: budgetary, payroll, inventory, insurance tracking, accounts receivables, fixed assets, student records, grading, attendance, scheduling, report cards, text book tracking, teacher access, family access, and food service.

On April 1, 1984, the business was incorporated as School Administration Software, Inc. It was this commitment of resources to the K12 market that was and continues to be the catalyst to Skyward's successful and sustained growth!

Historical Highlights

- 1980 - Jim King & Associates was founded in Stevens Point, Wisconsin.
- 1981 - A Personnel/Salary Negotiations software was developed for school districts.
- 1984 - The business was incorporated as School Administration Software, Inc.
- 1985 - The Skyward family of schools had grown from three to 50.
- 1988 - Skyward opens branch office in St. Cloud, Minnesota.
- 1992 - Skyward opens branch office in Bloomington, Illinois.
- 1994 - School Administration Software, Inc. acquired Matrix Computers, a special education administration software company.
- 1994 - School Administration Software, Inc. was renamed to Skyward, Inc. The company took on a new look and logo, yet maintained its focus on schools
- 1998 - Skyward opens branch office in Lansing Michigan.
- 2001 - Skyward partnered with the Washington School Information Processing Cooperative (WSIPC). In 2002 WSIPC began deploying software and systems throughout 277 Washington

School Districts.

- 2002 - Skyward acquired the SchoolAssyst™ Technical Division of TECS of Texas and opens Texas Branch office in Austin.
- 2003 - Skyward acquired Golden Concepts, LLC an information technology company dedicated exclusively to providing technology services to K-12. As a result Skyward opened a new branch office in Madison, Wisconsin named Enterprise Solutions.
- 2004 - Skyward completed an expansion to its corporate headquarters in Stevens Point of almost 26,000 additional square feet.
- 2005 - Skyward celebrates 25 years of providing administrative software exclusively to K-12 schools.
- 2005 - Skyward announces opening of branch office in Pennsylvania and a second Texas Branch office located in Dallas.
- 2005 - Skyward partners with the 41st largest district in the United States, Jordan School District as our first Utah customer.

Skyward's School Management Systems™ are found in over 1000 districts (not including Washington) throughout the United States.

Response to Hardware Needs

Skyward, Inc. made a commitment to respond to the need for hardware service by providing engineering support for both local area and wide area (LANs and WANs) computer networks. Skyward's Field Engineers oversee technical concerns for Skyward customers, making Skyward a complete service and data management solutions provider.

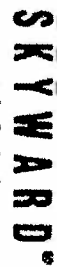
The Commitment

Skyward's growth has been steady, typically 15-20% per year and it has been carefully monitored. "We have made the firm commitment that our growth does not exceed our ability to serve and respond." Skyward, Inc. staffs five regional offices located in Stevens Point, Wisconsin, St. Cloud, Minnesota (opened 1988), Bloomington, Illinois (opened 1992), Lansing, Michigan (1998) and Austin, Texas (2002). The offices employ over 160 technical and support specialists whose primary mission is to "provide the most comprehensive, innovative, easy to use and cost effective administrative data processing system available anywhere."

Skyward is an active SIF Participant (Schools Interoperability Framework).



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Contact us at info@skyward.com
1-800-236-7274

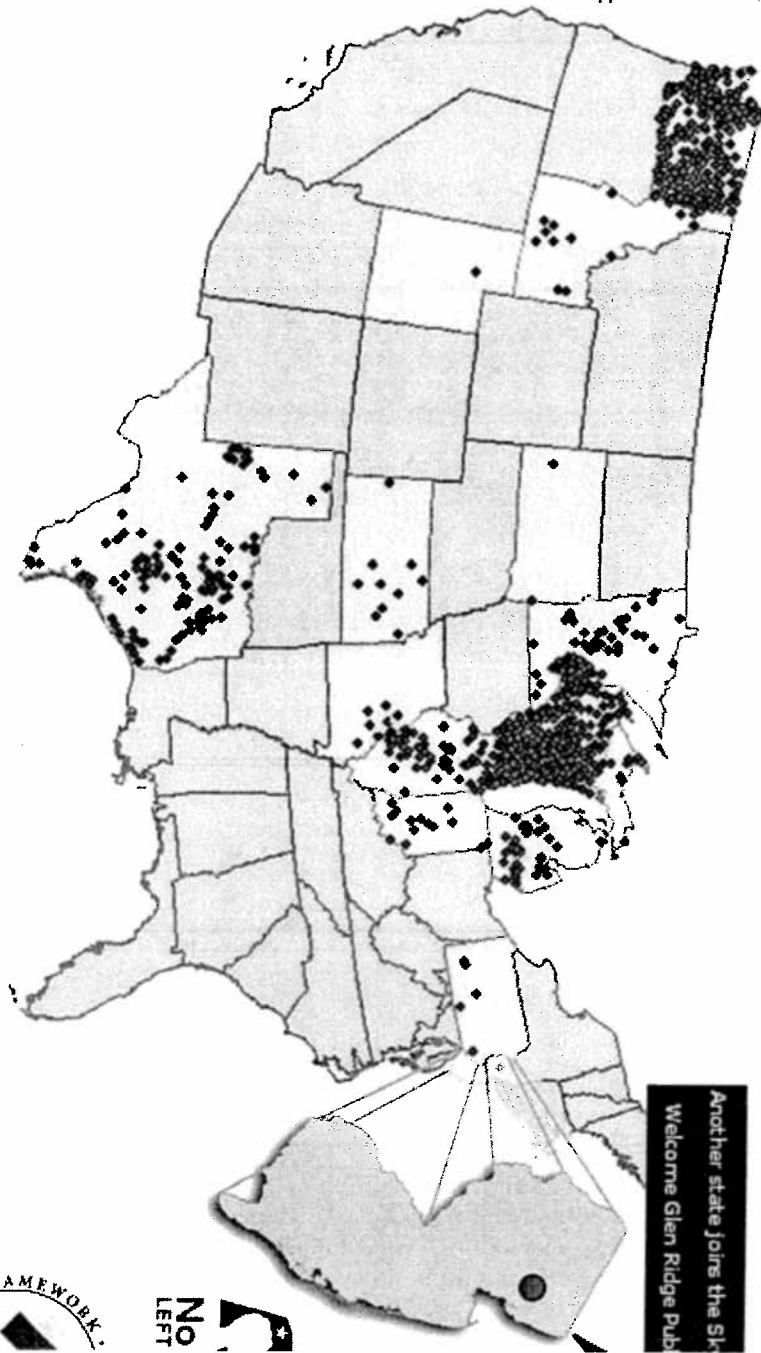
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Developer of Student, Budgetary and Human Resources Administrative software exclusively for K-12 school districts - public and private.

Skyward's mission is to provide the most comprehensive, innovative, easy-to-implement and cost effective K-12 administrative data processing systems available anywhere.

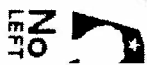
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Business Partners



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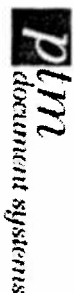
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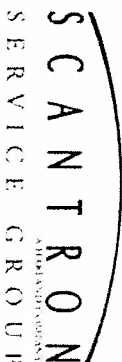
WHEN COMPATIBILITY COUNTS



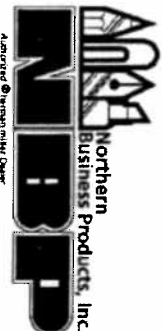
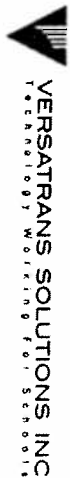
PROGRESS SOFTWARE



SCANTRON

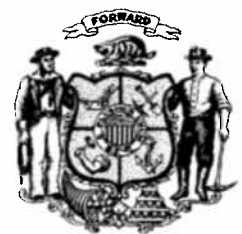


1.888.527.5225





WISCONSIN STATE LEGISLATURE



**CONFIDENTIAL
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AGENDA

(for internal discussion purposes only)

Meeting with Sen. Julie Lassa and Rep. Louie Molepske
Wednesday, July 5, 2006
10:00 – 11:00 a.m.

Location: Skyward, Inc. Offices - Stevens Point

Attendees: Jim King, CEO – Skyward, Inc.
Sen. Julie Lassa
Rep. Louie Molepske
Chad Taylor – Michael Best & Friedrich LLP

Discussion Topics:

1. Procurement miscues in acquisition of UW Payroll Software
2. Potential UW-SP Pilot Program of Skyward software
3. K-12 School System/CESAs Use of Lawson Software

Main Themes:

1. Costs to Wisconsin taxpayers of procurement mistakes
2. Protect Wisconsin taxpayers by better procurement practices
3. Skyward can provide a cost effective solution to UW System

Messages:

1. Skyward is a Wisconsin-based developer of student, budgetary and human resources administrative software for K-12 school districts.
2. Skyward currently employs 261 employees (196 of Skyward's employees are located in Wisconsin). In 2005 the average compensation per full time employee (**less Staff**) was \$59,483.77. We just implemented a 4.2% COLA adjustment this month so the average now would be \$61,863.00. Minimum salary for college graduates at Skyward is \$34,444.87 plus potential of \$2,000 if Skyward's profit goals are met. Minimum starting salary for non-college graduates at Skyward is \$31,283.20 plus a potential of a \$2000 bonus if profit goals are met.
3. Skyward is well-respected throughout the country, having its products utilized by **1076** school districts (a total of 5,082 buildings) in 14 states (Wisconsin, Washington, Utah, Texas, Idaho, Illinois, Indiana, Kansas, Minnesota, Pennsylvania, Michigan, Missouri, South Dakota and most recently New Jersey).

It should be noted that this Spring Skyward implemented its software at the American Consulate School in New Delhi, India.

4. If Wisconsin wants to implement a pilot program, Skyward willing to do so to show how a Wisconsin-based company can provide the solution to a problem on which the UW has now apparently wasted millions of Wisconsin taxpayer money.
5. Skyward willing to provide assistance/experience to the State to help it make for informed decisions with respect to the software procurement process.

UWSP Pilot:

- Develop a concept plan for a payroll software pilot program for the UW System.
- Pilot would be for a single site and provided through a cost-certain arrangement.
- Advantages of UWSP as pilot site:
 - (1) Same location as Skyward headquarters.
 - (2) Provides easy access for Skyward implementation and troubleshooting of software.
 - (3) Federal and State legislative districts are represented by democrats who have good relationships with current administration.
 - (4) Skyward can utilize its personal/professional relationships with individuals at UWSP to help persuade UW and DOA to undertake pilot program.
- Three-Tiered process beginning with UWSP personnel, then UW System and ending with DOA/Administration.
- Limitations: Significant evaluation and assessment needs to be conducted at "front-end" to determine UWSP and UW System's needs and goals and viability/desirability of undertaking pilot program from both Skyward and State's perspective.
- Proposal: Coordinate initial meeting with UWSP Chancellor, payroll and IT personnel to discuss concept and evaluate viability.

Wisconsin School Consortium:

- Madison Public Schools and a few other Wisconsin schools formed a Consortium and are promoting the very same Lawson product that was scrapped by the UW to other school districts in Wisconsin in direct competition with Skyward.
- Higher costs – Example: Racine student computer usage fee. To our knowledge, Racine has to pay \$1.00 per student per month just to run this

software. Skyward's proposal for this same service was .25 per student. That means Racine is spending \$16,500 (22,000 students times .75) a month more just to run the Lawson software.

- Sun Prairie, Lacrosse and McFarland were solicited by the Madison Consortium group to purchase the Lawson product instead of Skyward. These three schools selected Skyward. They are already "up and running" and they are paying a fraction of what it would have cost them if they went with the Lawson product being promoted by this consortium. I encourage you to contact all three of these schools and you will learn that they are very satisfied with the Skyward product and Skyward's support of that product.
- To my knowledge Madison, Verona, Middleton Cross Plains, Oregon, Racine all "bought into" the Lawson product being promoted by this consortium. I strongly encourage you to contact these schools so you can learn of their level of satisfaction and costs associated to the Lawson product compared to the three schools that chose Skyward.
- We think, but we are not sure, that this consortium is currently soliciting the Lawson product Howard-Suamico, Sheboygan and possibly Kettle Moraine school districts.
- Skyward's product can do the job as demonstrated in the customers that we serve with a student count that ranges from 10-80,000 FTE. Skyward's product is less expensive and best of all the money remains in Wisconsin to be reinvested in the community and provide more jobs.

CESAs:

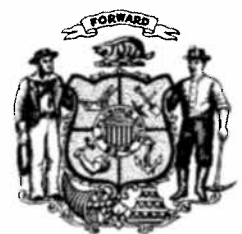
I attached the letter that the CESA's sent to Wisconsin schools that clearly identify their intentions to work "against" Skyward. Since this letter Skyward has invited all these schools to presentation seminars so we could demonstrate what we have to offer in contrast to what the CESAs are now promoting. We have experienced a lot of interest by these schools.



CESA Letter.pdf



WISCONSIN STATE LEGISLATURE



CHAIR:
Energy and Utilities Committee

MEMBER:
Higher Education and Tourism
Joint Committee on Audit
State Building Commission

ROBERT L. COWLES
Wisconsin State Senator • 2nd Senate District

NEWS RELEASE
FOR IMMEDIATE RELEASE
July 5, 2006

For More Information Contact:
Senator Cowles
at 1-800-334-1465

Statement of Sen. Robert Cowles on Decision by the University of Wisconsin System to Abandon \$26 Million IT Project

“The decision by the University of Wisconsin System to abandon the implementation of their payroll and benefit system is appalling. The taxpayers have already sunk \$26 million into the project, and will get nothing in return.”

“This failed IT project, which is another in a long list of failed state government IT projects, demonstrates once again why a comprehensive audit of all of these projects is necessary, and I look forward to seeing the results of the current audit being conducted on these projects when it is released this winter.”

“The state’s taxpayers deserve accountability from both their government as well as the vendors who are awarded these contracts. The government should not be signing contracts with vendors unless the contracts have the necessary provisions to protect the taxpayers. Vendors who do not deliver their products as promised should not get paid. This colossal waste of taxpayer money must stop now.”

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TDD Hotline: 1-800-228-2115
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300 W. St. Joseph Street
Green Bay, WI 54301-2328
920-448-5092
Fax: 920-448-5093

Executive Summary
UW Makes Strategic IT Decision

- The UW System will not pursue completion of its Appointment, Payroll, and Benefits System (APBS) with Lawson software. The difficult five-year implementation effort has been under review since the Spring of 2005 and then on hold since mid-Fall of 2005 while progress to-date, challenges to completion, and options have been evaluated. Short-term the UW will continue to utilize its in-house developed legacy system, software that has been developed since merger of the campuses into one UW System 30 years ago. UW-Madison has been administering the payroll and benefits system for all of the system's campuses and will continue to do so when a new system is implemented in the future.
- The UW System has taken advantage of the recent selection of Oracle/PeopleSoft by the state's Department of Administration (DOA) for its IBIS suite of IT implementations (procurement, financials, and human resources). An evaluation by the UW had previously determined that Oracle/PeopleSoft could serve the UW's human resources needs well. In addition, this strategic decision leverages the UW's prior and future implementations of Oracle/PeopleSoft products. The UW will move to do parallel, but separate, implementations of e-procurement with DOA soon, and begin immediate planning to do a similar implementation with DOA for its HR-payroll-benefits system in the future. Working in concert with DOA will ensure timely and cost effective implementations for both the UW and DOA. In addition, there are significant cost efficiencies to the UW's purchase at this time of the procurement, student administration, shared financials, and human resources-payroll-benefits software under DOA's purchasing authority.
- This strategic opportunity presented by the timing of DOA's IT initiative and its selection of Oracle/PeopleSoft will enable the UW to complete a cost effective long-term business solution for its goal of a common system-wide IT conversion. This work began nearly ten years ago with the implementation of PeopleSoft for financial and student information systems. Today a majority of the UW's campuses have implemented both. Adding Oracle/PeopleSoft's e-procurement and human resources-payroll-benefits system will enable the UW finally to move all of its campuses to a suite of major IT "common systems." Bringing all of this together has been a formidable challenge that has confronted the UW since merger. In addition, UW-Madison is currently in the process of implementing PeopleSoft Grants Management and PeopleSoft Expense Management, both of which are licensed for all of the UW System.
- The cost efficiencies resulting from the UW's ability to purchase separate instances of the software required for the remaining UW campuses at a reduced cost through DOA's contract with Oracle/PeopleSoft are significant. The reduced cost of all licenses for all systems for the UW is \$2.5 million.
- The \$26 million expended over five years of the APBS implementation attempt included the purchase of hardware that is and will continue to be utilized for other needs. The experience gained during the implementation attempt will have ongoing value and application for the UW and DOA as we plan for and implement Oracle/PeopleSoft human resources-payroll-benefits systems in concert.

**A History of Large-Scale Information Technology Application
Implementations in the UW System
&
Lessons Learned from the APBS Project**

IT Implementations by the UW System

Over the past decade, the UW has undertaken five major multi-million dollar, IT application implementations involving almost all UW institutions. These projects include:

- The Endeavor Library Automation System implemented from 1998 to 2000.
- The PeopleSoft Shared Financial System Project implemented from 1998 to 2001.
- The PeopleSoft Student Administration Project implemented from 1997 to 2005.
- The Desire2Learn Course Management System implemented from 2003 to 2004.
- The Lawson Appointment, Payroll, and Benefits System (APBS) from 2001 to 2006.

Each of the first four projects—Library, Financials, Student Administration, and Course Management—were multi-year projects. These projects were successfully completed on or near the targeted project timeline with minimal or nonexistent cost overruns. The projects are now in full production and have undergone numerous major software upgrades through the life of the application. All enable the UW to manage more efficiently and effectively.

The APBS project will not be completed. Following an assessment of the project's viability and the timing of available options, the decision was made in June 2006 to end the implementation and pursue a parallel but separate implementation in concert with DOA's Oracle/PeopleSoft implementation in the future.

Also of critical strategic importance, the shared financial system and student information system projects, now successfully implemented on a significant majority of the UW campuses, will now be completed for all campuses with reduced licensing costs for the Oracle/PeopleSoft software.

Lessons Learned in the APBS Implementation Attempt

We learned much in the implementation which will be utilized in preparing for all future complex IT implementations. Key among them are:

- Engage professional project management and more project-experienced individuals/consultants earlier in the implementation process.
- Provide a balance between IT and end-user involvement.
- Improve organizational project management methods to set standards and controls.
- Create a balanced steering committee with the active involvement of executive level management.

- Identify complex business processes before implementation begins and establish effective change control procedures when the complexity of the business process or policy requires modifications or customizations to the software application.
- Communicate, communicate, and communicate: Communication throughout the life-cycle of the project from planning, implementation to production is imperative.
- Utilize UW-Madison personnel in a central role in the implementation given that it is the current provider for the UW System's payroll, and will continue to serve in that capacity in a new system.
- Develop realistic funding models for a major implementation of this type and budget the resources to ensure timely implementation in accordance with a sound project plan.
- Engage external reviewers throughout the project to analyze and monitor progress toward project completion.
- Manage the project as part of the overall portfolio of IT projects with which the project is/will be integrated. Ensure that all project managers are in constant and effective communication with each other in regard to any touch points or interfaces.
- Establish clear lines of authority, oversight, and responsibility for the project.
- Seek timely technical advice of the campus CIOs and others in and outside the UW.

Carry-over Value of the APBS Implementation Attempt

We accomplished much in the APBS implementation attempt that will have on-going value and application as we plan and implement our future Oracle/PeopleSoft human resources, payroll, and benefits system. The accomplishments include:

- We purchased hardware for the implementation attempt which is being utilized to meet other needs.
- We developed an understanding of our business process re-invention and change management issues associated with a modern HR/Payroll/Benefits application through:
 - An analysis of UW business processes prior to the APBS implementation;
 - An identification of data in the legacy system that is used by all institutions and an inventory of institution-specific shadow systems;
 - An identification of UW policies and procedures that need to be addressed in order to proceed with an enterprise resource planning (ERP) software implementation following best business practices.
- We developed a storehouse of information which will be reusable including:
 - A review and record of current business practices as part of re-engineering;
 - The development of hundreds of scenarios that can be used in case study testing;
 - The employee self-service testing results at six institutions to determine the base-level employee self-service which can be rolled out in a future implementation;
 - The identification and documentation of all interfaces that currently exist and are dependent upon HR/Payroll/Benefits data.

- We built “collateral” support applications that can be reused or repurposed including:
 - An authentication hub (identity management) which is accessible by any new software application;
 - A template for a data warehouse that can be used to implement more timely reporting;
 - An extensive set of online training modules and experience with an analysis of the strengths and weaknesses of online training as a supplement to face-to-face training.

- We have reorganized, strengthened, and educated UW leadership in regard to IT project oversight through:
 - Creating a new oversight and management structure for the current legacy system and any future HR/Payroll/Benefits application;
 - Broadening the representation and strengthening the authority of the Common Systems Review Group to monitor the budgets and progress of all System-wide IT implementation projects.




Executive Senior Vice President

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(608) 262-3985 Fax

email: dmash@uwsa.edu
website: <http://www.wisconsin.edu>

July 5, 2006

TO: Chancellors

FROM: Don Mash 
Executive Senior Vice President

RE: Strategic Information Technology (IT) Decision

After extensive due diligence and consultation with you, your key campus personnel, and others, the UW System Service Center Executive Committee has decided that the UW System will not complete the implementation of a system-wide appointment, payroll, and benefit system (APBS) utilizing Lawson software. This decision is prompted by the difficult implementation effort and the timing of the opportunity presented by the state's Department of Administration decision to implement its Integrated Business Information System (IBIS) initiative with Oracle/PeopleSoft Enterprise Solutions.

This decision leveraged our purchasing power for the software needed for a parallel, but separate, implementation of e-procurement with DOA soon and, eventually, a similar implementation of a human resources, payroll and benefits system. It also provided the same cost-effective purchase of the additional licenses needed to enable our remaining campuses to implement Oracle/PeopleSoft shared financial and student information systems, key IT systems that a majority of our campuses have already implemented.

As you know, in addition to currently utilizing PeopleSoft for two of our major IT systems (financials and student information), UW-Madison is implementing two additional PeopleSoft systems (grants and expense management) which are licensed for the entire UW System.

This strategic decision to take advantage of the opportune timing of DOA's selection of Oracle/PeopleSoft will enable the UW to implement our key common systems for all of our campuses in the foreseeable future. This challenge has been with us for decades, in some respects since merger of the UW System, and the ability to partner with state government in this way will benefit Wisconsin. This is a critically important development for the UWS long-term.

Chancellors
July 5, 2006
Page Two

Attached is an executive summary (Attachment I) which provides more detail. Also attached is background information on the UW's large-scale IT project experiences and "lessons learned" (Attachment II) from our work on the APBS implementation attempt.

Attachments

copy: President Reilly
UWS Service Center Executive Committee
Provosts
Chief Business Officers
Chief Information Officers
Human Resources Directors
UWS Cabinet
UW Public Information Officers
UW Legislative Liaisons