Agency Director Electronic Handbook

February 9, 2012

Project Members

Project Advisor- John Cunningham

Project Team- For more information about this project, contact team members:

- Cindy Caruso cindy.c.12@bwc.state.oh.us (614) 466-6870
- Cynthia Gerst Cynthia.gerst@dot.state.oh.us (614) 466-1975
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Project Summary

Across state government there are a myriad of responsibilities that fall on the shoulders of an agency, board, or commission. Oftentimes these responsibilities are overlooked because of changes in staff or because there is not a central place that catalogs these requirements. Some of these responsibilities are time sensitive and need immediate attention, but they are not easy to locate and not readily apparent to the leadership, especially during times of transition.

The project parameters that were provided to us, were as follows: This project should be the development of a focused document and/or website that will identify these responsibilities and provide direction as to how to meet them. It should include research; working with agency directors to see what types of information would have been beneficial to them as they were starting, and the development of a website to centrally house this information.

Our sponsor had a very extensive list of the categories and types of information that should be included in this website which he had compiled over several years working in the Department of Administrative Services. Our mission became one of searching for the most relevant information while providing existing link information in one easy to use, easy to maintain one-stop source.

Project Goal

The purpose of this project was to develop a focused webpage to serve as a central location that catalogs requirements, identifies agency responsibilities, and provides direction to new directors and staff to be able to meet the myriad of responsibilities required of their agency, board, or commission. Resources provided include Administrative, Human Resource, and Fiscal Information.

Our goal was to create a comprehensive, user-friendly webpage using existing links to relevant and timely information. We hope that users will help keep this website current and relevant by clicking the "contact the webmaster" link when information requires updating or links need to be changed.

Project Vision

The long-term goal of this project is that in twenty-plus years a new administration will be using the website to find their way around an unfamiliar, new system and find that our website has been maintained and relevant and that using it eases their transition into their new roles into state government.

Project Action Plan & Execution

The project was reviewed and assigned to our team. Our project lead immediately defined group roles and responsibilities and set-up a meeting with the project sponsor, John Cunningham. During the first meeting the team created the group charter and established further actions and timelines for completion of the project.

The team then developed a project schedule to plan the various tasks which would be necessary to achieve the objectives of our sponsor. Each team member contacted their own agency, as well as the various boards and commissions, to get feedback regarding any additional needs and or information that may have been overlooked. Once received, all suggestions were incorporated into the project.

The information data list, provided by our sponsor, was divided up evenly among the six team members for research on relevant links, via the internet. Once completed, the team then compiled the work lists into a combined document and met with sponsor for additional clarification. Another

follow-up meeting was scheduled at which time the team sponsor assisted in fine-tuning relevant links and categories.

Contact was made to the Office of Information Technology (OIT), John Verdes, in order to inform and provide understanding of the requirements and timeframes for adding a webpage onto the Department of Administrative Services (DAS) website, Ohio.gov.

The team wrote a project specification document, submitted the document to OIT, and a webpage link was created by the IT department. We were provided access to the webpage to develop, test, modify, and improve the webpage.

The test webpage was reviewed by the Governor's Office who provided some constructive feedback. Our team reviewed the test webpage together and reviewed every link. We further consolidated, modified, and improved the page.

Project Information Gathering

The team sponsor provided a list of categorized topics and responsibilities for which he felt would be helpful to new leadership and their staff if a single webpage contained links to current and relevant information regarding these topics and responsibilities.

The team took this list and divided it into six equal sections and each of us looked for existing, relevant information for these topics and responsibilities and saved the link. We then combined these links in a single spreadsheet for further analysis. We contacted various agencies, boards, and commissions to inform them of our project and ask for any input that they would like to give.

Based on conversations we had with various agencies, boards, and commissions, we made adjustments to the information we were gathering. We contacted the OIT Department to review their requirements and policies. Their policy is included in the appendix.

Project Analysis

As a group, we considered the information we had compiled during the gathering process by asking ourselves, "Is this the information I would be looking for if I were a new director?" If the answer was yes, we saved the link and moved on. If the answer was no, we kept searching for a more appropriate link to more relevant information.

Next, we reviewed each link with our sponsor who verified each one or in some cases showed us other information that he was familiar with and we replaced a few of the links we had previously listed. Some topics were modified, consolidated, or completely dropped from the list.

We refined the categories as the test webpage came together and reviewed the list with the sponsor again.

We met again as a team to review the links on our test webpage. We fine-tuned the website and the categories. It was apparent that if this webpage is going to remain current and relevant that we would need to find a method to automatically prompt an update. Some links which had worked initially were no longer live webpages. We updated those and added a prompt to contact the webmaster if a link did not work or required updating.

Project Results

The result of our project is a webpage on Ohio.gov that communicates details on transition planning for agency directors, boards, and commissions. The webpage uses links to existing information at a single, reliable, easy-to-use source.

The webpage is designed to assist users with finding information in three major categories which include administrative, human resources, and fiscal information.

We believe that our project is successful for the following reasons;

- Webpage is online and functioning as intended
- Webpage meets the needs initially defined by our sponsor and approved by our stakeholders
- Webpage is sustainable

Please visit the webpage at: http://das.ohio.gov/leadershipTransition.aspx

Agency Director Electronic Handbook SWOT

Strengths:

- Strong data set
- Cohesive group
- Diverse knowledge and experience of team
- Consistency of project parameters
- Technical ability of team

Weaknesses:

- Sponsor relocation (job)
- Redundant research

- Limited sponsor involvement and interacting
- Clear direction on webpage ownership
- Little feedback from other agencies

Opportunities:

- Great resource for new directions and staff
- Controlled test environment
- Great potential for webpage expansion
- Eye opening to issues facing new hires

Threats:

- Ongoing changes to sites linked will continue into the future
- Agency Ownership

Project Benefits

The benefits of this project are believed to be; assisting new agency directors their staff, board, and commission members with quick and relevant administrative, human resource, and financial information. We expect that there will be a considerable, although immeasurable, financial benefit for new leadership to have this information available at their fingertips allowing them to hit the ground running. As well as usage by all agencies in the State, this will help improve the consistency of processes and information used throughout State government.

With the link that we have included which directs problems and questions back to the Department of Administrative Services, we believe that the site can remain current and useful. We hope that

positive feedback from users of the webpage will encourage our stakeholders to maintain and even expand the use of the site.

Project Team Dynamics

Team dynamics developed easily. During our first meeting, we were able to quickly put together the responsibilities list and everyone felt very comfortable with the roles they were assigned:

- *Project Lead* - Neelima Savardekar –

  Kept the project on track and communicated with our stakeholders.
- *Project Coordinator / Facilitator* - Cynthia Gerst –

  Maintained the project schedule, coordinated meetings, and prepared our presentation.
- *Business Analysts* – Jeff Gamble and Dan Driscoll –

  Collected requirements from users and other stakeholders and prepared documents.
- *Technical Resources* – Cindy Caruso and Elizabeth Williams –

  Confirmed, tested, and updated the links and designed the layout of the webpage with a focus on keeping it user friendly.

We discussed our MBTI types and discussed how that would affect how we interacted with each other and what each of us could bring to the project:

- ESTP – Cindy Caruso
- INFJ – Cynthia Gerst
- ISTJ – Dan Driscoll; Jeff Gamble
- ESTJ – Neelima Savardekar; Elizabeth Williams

Our extroverts, Neelima, Cindy, and Elizabeth were provided roles that involved interaction with contacts outside of the group. Cynthia, Dan, and Jeff's roles allowed them to focus their interactions with team members.

The majority of our team preferred 'sensing' with only one team member preferring 'intuition' for taking in information. Cynthia as the "N" was able to look at the bigger picture and point out anything that the rest of the group may have missed and constructively question any decisions that did not make sense to her initially. This dynamic caused us all to think carefully through decisions being made.

The majority of our team fell into the 'thinking' category vs. the 'feeling' and the 'judging' category vs. "perceiving". When it came to making decisions, Cynthia was able to look at things from another perspective which proved to be very helpful when thinking about how to accommodate different styles of people and achieve the greatest customer-service for the site. It reinforced how important it is to have a variety of members on a team for maximum quality in a project. Where the rest of the group looked at everything very logically, Cynthia was able to look at it from a values perspective.

Looking at these dynamics in advance helped our group be able to react to communication in a very professional and team-oriented manner. We agreed that communications would be mainly done via e-mails that included all of the group members and updates to the group would be done on the days we had courses scheduled. We discussed that if there were any disagreements that Neelima, as the project manager, would make the final decision and we would all follow her lead. We provided each other with contact information to encourage dialogue early on in the project.

Everyone fell into their roles very easily and we noticed that team members were willing to step in to assist if other team members found themselves busy with day-to-day assignments at their respective agencies. Timelines were laid out to provide reasonable goals that everyone agreed upon. The group was willing to work around everyone's hectic schedules and meet based on consensus.

By understanding our individual differences, strengths, and weaknesses the team was able to collaborate and accomplish the project goals in a supportive environment.

OCPM Application

Over the course of the 10 months that our team actively worked on this project we used most, if not all of the principles that we learned and practiced in this program. Although some of these principles have been discussed elsewhere in this report, we have included below, the principles which had the greatest impact on the success of our project.

Reinventing Government – Our project sponsor, John Cunningham, astutely recognized that many new directors and their staff, boards, and commissions were running into the same stumbling blocks and were approaching the Department of Administrative Services with the same questions and problems. He was diligent in maintaining a list of the questions, at least categorically, and had the foresight to submit this matter as a possible OCPM project where he knew that a motivated team of capable managers would be able to assist him with the creation of a document or website that could quickly and easily direct it's users to the answers that they need and streamline what was once a cumbersome process. This project, which Mr. Cunningham had envisioned, should increase the

efficiency of new administrators in State agencies, boards, and commissions as well as improve the consistency of the information they are using.

Building and Leading Teams – As we discussed in the Team Dynamics section of this report, the structure of our team fell into place very quickly and easily. We attribute this in large part to the amount of time and energy that we have devoted to understanding ourselves and others. Roles were not truly assigned, but rather each individual on our team recognized that due to his or her particular skills and abilities that there was a role that he would be best suited for and would therefore would allow him to make his most significant contribution to the team and the project.

Because, the project is a course requirement, we all shared the same vision to create a webpage that would meet and hopefully exceed the needs and expectations of our sponsor. Similarly, we had the necessary organizational support to devote the necessary time to the project and to use the resources needed to complete our project.

The goals that we set were milestones which would result in the timely completion of our project. We agreed upon the processes and procedures to accomplish each of our goals and a communication plan for our team. Meeting every two weeks to review progress and get and give feedback was truly beneficial to our team. Our team culture was very supportive and encouraging which kept each individual and the project moving forward to the ultimate completion of our project.

Effective Presentations

- Learn how to structure the messaging and provide guidance on verbal and non-verbal communication

- Visual-enhance the presentation
- Detail planning

Project Management for Managers

- Understanding scope, learning objectives and goals of the project
- Requirements, charter and scope was obtained

Managing for continuous improvement

- To have project discussions and group activities
- Implement processes and overcome obstacles

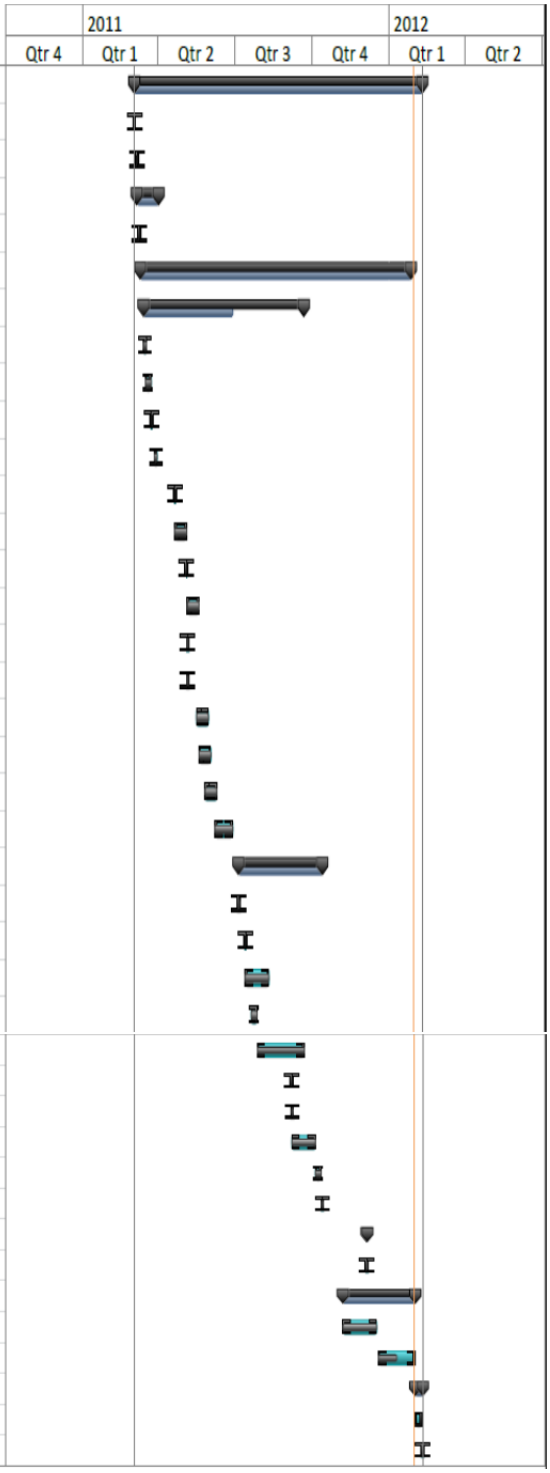
Communication Skills for Managers

- Vital has team collaboration was must
- Build trust

Appendix

[A] Gantt Chart

ID	Task Name	Duration	Start	Finish
1	Agency Handbook Website	1960 hrs	Fri 3/4/11	Thu 2/9/12
2	Sponsor Meeting	1 hr	Fri 3/4/11	Fri 3/4/11
3	Web Requirements Conference Call	1 hr	Mon 3/7/11	Mon 3/7/11
4	Project Charter	160 hrs	Mon 3/7/11	Fri 4/1/11
7	Status Report Format	3 hrs	Thu 3/10/11	Thu 3/10/11
8	Project Status Reporting	1841 hrs	Fri 3/11/11	Fri 1/27/12
33	Requirements Gathering	1096 hrs	Tue 3/15/11	Wed 9/21/11
34	Agency Link Research	24 hrs	Tue 3/15/11	Thu 3/17/11
35	Compile Agency Links	40 hrs	Thu 3/17/11	Wed 3/23/11
36	Elevator Speech	2 hrs	Thu 3/24/11	Thu 3/24/11
37	Requirements document	24 hrs	Mon 3/28/11	Wed 3/30/11
38	Link validation meeting	2 hrs	Thu 4/21/11	Thu 4/21/11
39	Agency and Board Stakeholder conversations	80 hrs	Thu 4/21/11	Wed 5/4/11
40	Sponsor Meeting	1 hr	Thu 5/5/11	Thu 5/5/11
41	Second round of Link Research	80 hrs	Fri 5/6/11	Thu 5/19/11
42	Calendar Research	8 hrs	Fri 5/6/11	Fri 5/6/11
43	Voucher Approval Research	8 hrs	Fri 5/6/11	Fri 5/6/11
44	Discipline Grid Research	80 hrs	Tue 5/17/11	Mon 5/30/11
45	Rough draft of Handbook	80 hrs	Fri 5/20/11	Thu 6/2/11
46	Sponsor Feedback	80 hrs	Fri 5/27/11	Thu 6/9/11
47	Sponsor Verification	120 hrs	Wed 6/8/11	Tue 6/28/11
48	Website Development	576 hrs	Wed 7/6/11	Thu 10/13/11
49	Transition to new DAS IT lead	8 hrs	Wed 7/6/11	Wed 7/6/11
50	Third Link Review meeting	3 hrs	Thu 7/14/11	Thu 7/14/11
51	Governor's Office Review	160 hrs	Thu 7/14/11	Wed 8/10/11
52	Web Site Draft	40 hrs	Thu 7/21/11	Wed 7/27/11
53	Web Site Editing	320 hrs	Thu 7/28/11	Wed 9/21/11
54	Web Site Validation Meeting	3 hrs	Wed 9/7/11	Wed 9/7/11
55	Final Link Review	8 hrs	Wed 9/7/11	Wed 9/7/11
56	Web Site Updates	160 hrs	Wed 9/7/11	Tue 10/4/11
57	Sponsor Approval	40 hrs	Wed 10/5/11	Tue 10/11/11
58	Project Team Meeting	8 hrs	Thu 10/13/11	Thu 10/13/11
59	Website Deployment	8 hrs	Mon 12/5/11	Mon 12/5/11
60	Web site GO LIVE	8 hrs	Mon 12/5/11	Mon 12/5/11
61	Project Deliverables	496 hrs	Mon 11/7/11	Tue 1/31/12
62	Report Drafting	240 hrs	Mon 11/7/11	Fri 12/16/11
63	Report Editing	256 hrs	Mon 12/19/11	Tue 1/31/12
64	Project Presentation	56 hrs	Wed 2/1/12	Thu 2/9/12
65	Presentation Prep Work	48 hrs	Wed 2/1/12	Wed 2/8/12
66	Final Presentation	8 hrs	Thu 2/9/12	Thu 2/9/12



[B] Project Charter

Title: Agency Director Electronic Webpage

SCOPE

Sponsor*:* John Cunningham, DAS Administrator

Objective: Develop a focused document/webpage to serve as a central place that catalogs requirements and identifies agency responsibilities, some of which are time sensitive, and provides direction to new directors and staff, boards, and commissions to meet these requirements.

Background: Across state government there are a myriad of responsibilities that fall on the shoulders of an agency, board, or commission. Oftentimes these responsibilities are overlooked because of changes in staff or just because there is not a central place that catalogs these requirements. Some of these responsibilities are time sensitive and need immediate attention, but they are not easy to locate are not readily apparent to the leadership, especially during times of transition.

Customers and Stakeholders include:

Customers	*Stakeholders*
Citizens of Ohio desiring and efficient agency	Boards and Commissions
DAS Central Service Agency	DAS Central Service Agency
Future agency directors and staff	Individual agencies
	Legislative Service Commission

Customer Requirements/Expectations:

Develop a detailed document and/or webpage that enumerate transition planning with guidance to agency directors, boards, and commissions.

Final Deliverable:

The final deliverable is a webpage on Ohio.gov that communicates details on transition planning for agency directors, boards, and commissions.

Final Deadline:

Official presentations will be on Thursday, February 9, 2012. The team goal is to submit final paper on Tuesday, January 10, 2012.

Reviews and Approvals Required

- Co-sponsor of the Boards and Commissions reviewed the data points to make sure they were in alignment with the intended vision.
- Sponsor reviewed final links and approved the content for the webpage.

DELIVERABLE

Interim Deliverable	Review	Approval	Reason
DAS testing environment – review before finalizing to production			

ASSUMPTION

Assumption	Confirmed	Rejected
There are core responsibilities common to all state agencies, boards, and commissions.		
Agencies, boards, and commissions can fulfill requirements more effectively when they are aware of them.		
An accessible website is an appropriate tool to communicate agency, board, and commission requirements.		

RESOURCES

Team Assignments

Project Leader: Neelima Savardekar

Project Team: Cindy Caruso, Dan Driscoll, Jeff Gamble, Cynthia Gerst, and Elizabeth Williams

Budget $0

Other Resources:

- John Cunningham, DAS Administrator
- DAS IT Division: Shawn Shelstad and John Verdes
- Boards & Commissions – Nancy Manns
- DAS website, Ohio.gov – Chris Wilkins

MILESTONE LIST

Milestone	Estimated Hours
Web link research (in sponsor's initial list)	
Agency specific research: recommendations and documents	

COMMUNICATION PLAN

Who?	Needs to Know What?	When?	In What Form?
John Cunningham	Progress and Roadblocks	Bi-weekly	e-mail
All team members	What's been done	Each Friday	e-mail

RISK MANAGEMENT PLAN

Risk	Probability	Impact	Contingency Plan/Individual Responsible
Cannot access Ohio.gov link	Low	High	Shawn / how to advertise DAS site
Links becoming outdated before project completion.	High	High	John Verdes / continual maintenance for site functionality

EVALUATION PLAN

Desired Outcome	Evaluation Method	Success Measurement
Functional and accessible web page	Test web links on the webpage.	Web links are functional and redirect user to the appropriate web page.

[C] IT Requirement Specifications

Purpose: Develop a focused document/webpage to serve as a central place that catalogs requirements and identifies agency responsibilities, some of which are time sensitive, and provides direction to new directors and staff to meet these requirements during transition.

Scope: The *cohort 44 webpage* will use existing links to access current information existing on the State website. The webpage will not create or provide any new information.

Benefits: The benefits of this new webpage will be to facilitate government transitions and to provide a user friendly resource for stakeholders and their staff to retrieve information.

Current System: No current system exists.

Desired System: The desired system will be a new webpage on ohio.gov and should provide a user friendly resource for stakeholders to review / identify various responsibilities and find other resources to assist with fulfilling these responsibilities.

Definitions:

Stakeholders – Agency Directors & their staff, Boards, Committees, all State Departments which have requirements or resources which need to be made readily available to others listed here.

Acronyms:

DAS -Department of Administrative Services

IT -Information Technology

ITP -Information Technology Policy

OIT -Office of Information Technology

OCPM -Ohio Certified Public Managers

URL -Uniform Resource Locator

References:

- State of Ohio IT Policy for Executive Branch Cabinet Agency Web Site Standardization # ITP-F.4. http://redesign.ohio.gov/ and other IT policies incorporated by reference.
- State of Ohio IT Policy for Web Site Accessibility http://das.ohio.gov/LinkClick.aspx?fileticket=99cw1kez4Hc%3D&tabid=107
- State of Ohio Website http://www.ohio.gov

Functional/Business Requirements:

The Leadership Transition webpage should have links to the following policies and need to be classified under Administrative, Human Resources and Fiscal areas.

for Administrative Information

Annual Reports

Approving Time and Attendance Policies

Attorney General Role

Business Cards

Central Service Agency

Commuter Choice Program

DAS Directives (Laws, Rules, Regulations)

Electronic Filing

Employee Development Funds (EDF)

Equal Opportunity

Ethics Commission Resources

Ethics Law

Financial Disclosure Requirements

Fleet Management

Human Resources Policies

Human Resources Policy Index

Inspector General Role

IT Policies

JCARR - The Joint Committee on Agency Rule Review

Joint Management Group

Legislation

Lobbyist Registration

MBE/EDGE Certifications

OAKS (Ohio Administrative Knowledge System)

Office of Budget and Management

Ohio Administrative Code

Ohio Revised Code

Real Estate and Planning Contacts

Records Management

State of Ohio Policies

Union Education Trust

Use of State Vehicles (vs. personal auto)

Working for the State

for HR Information

Classifications and Compensation Guidance

Collective Bargaining

Discipline

Discipline Grid

Employee Pay Reduction/Suspension/Removal

Forms

Layoffs Procedures

Leave

New Board/Commission Member Appointments (forms, etc.)

Ohio Hiring Management System

Overtime

Personal Action (PA)

State Payroll Processing

State Personnel Board of Review Organization

Workforce Planning

for Fiscal Information

Accounts payable Forms & FAQ

Budget

Budget Analyst Contact List

Controlling Board

Electronic Data Exchange (EDI)

Executive Budget for FYs 2010 and 2011

ISTV Vouchers

OAKS Access Request Form

OAKS Business Intelligence (BI)

Office of Budget & Management

Ohio Shared Services

Online Travel Rules and Information

Requisition Approval Tutorial

State Procurement

Travel and Expense

Non-Functional Requirements:

Availability**:** The website should be available to users 24/7/365.

Accessibility Statement**:** The web page will be maintained in compliance with ITP-F.4 and

Efficiency**:** When a user selects a link, the desired location or information should be successfully located every time.

Flexibility**:** The website should be reduced or expanded as required to meet the needs of its users as approved or requested by the DAS.

Interoperability**:** The webpage should function well using Windows or MAC and multiple browsers.

Maintainability**:** Webmaster will update any outdated links or add new content upon request

Testability**:** When a user selects a link, the website should connect to the correct location. All

links should be verified.

External Interfaces

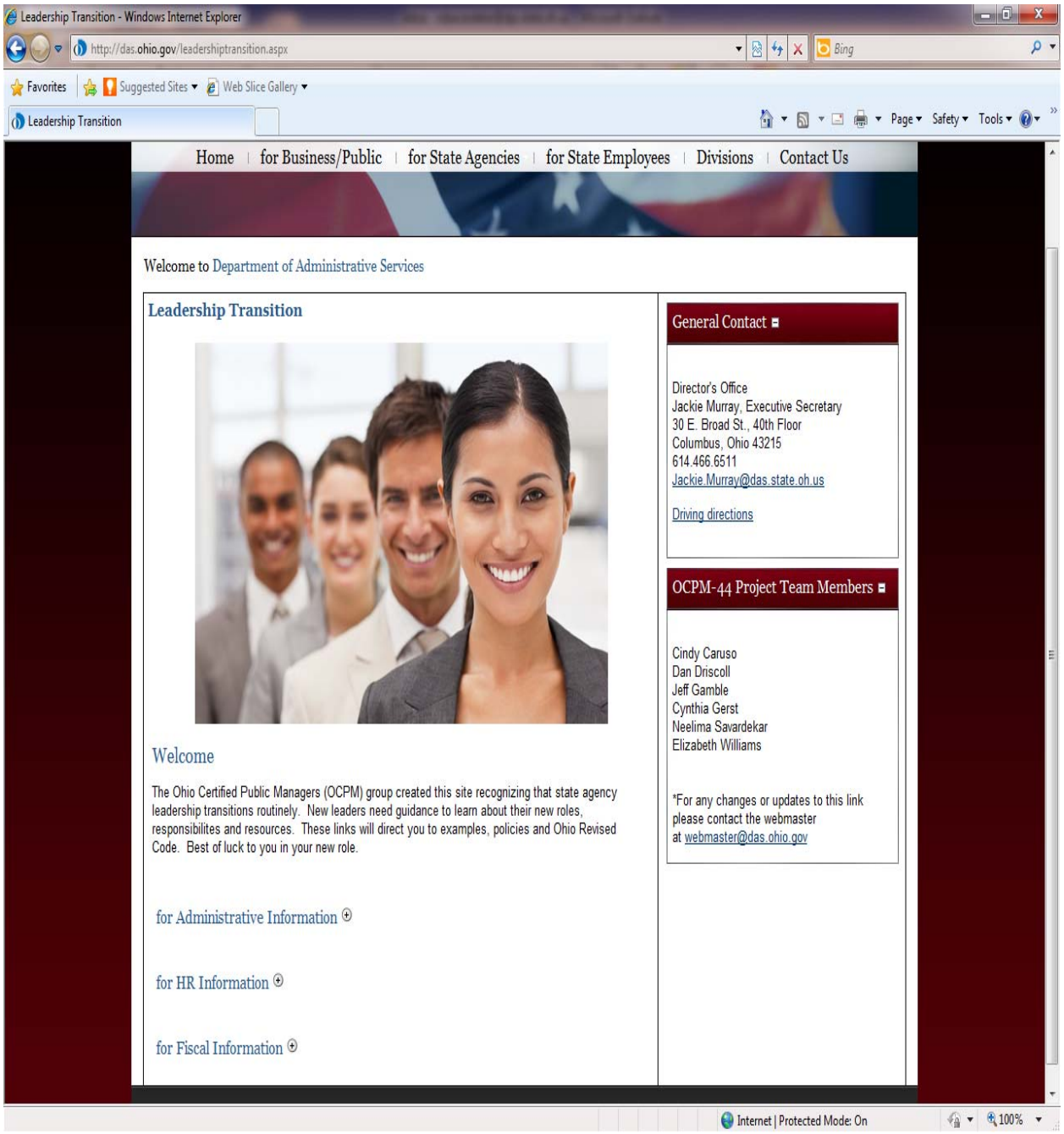
User Interfaces**:** The website should be consistent in every way with the State of Ohio Policy for Executive Branch Cabinet Agency Web Site Standardization # ITP-F.4.

Design Constraints

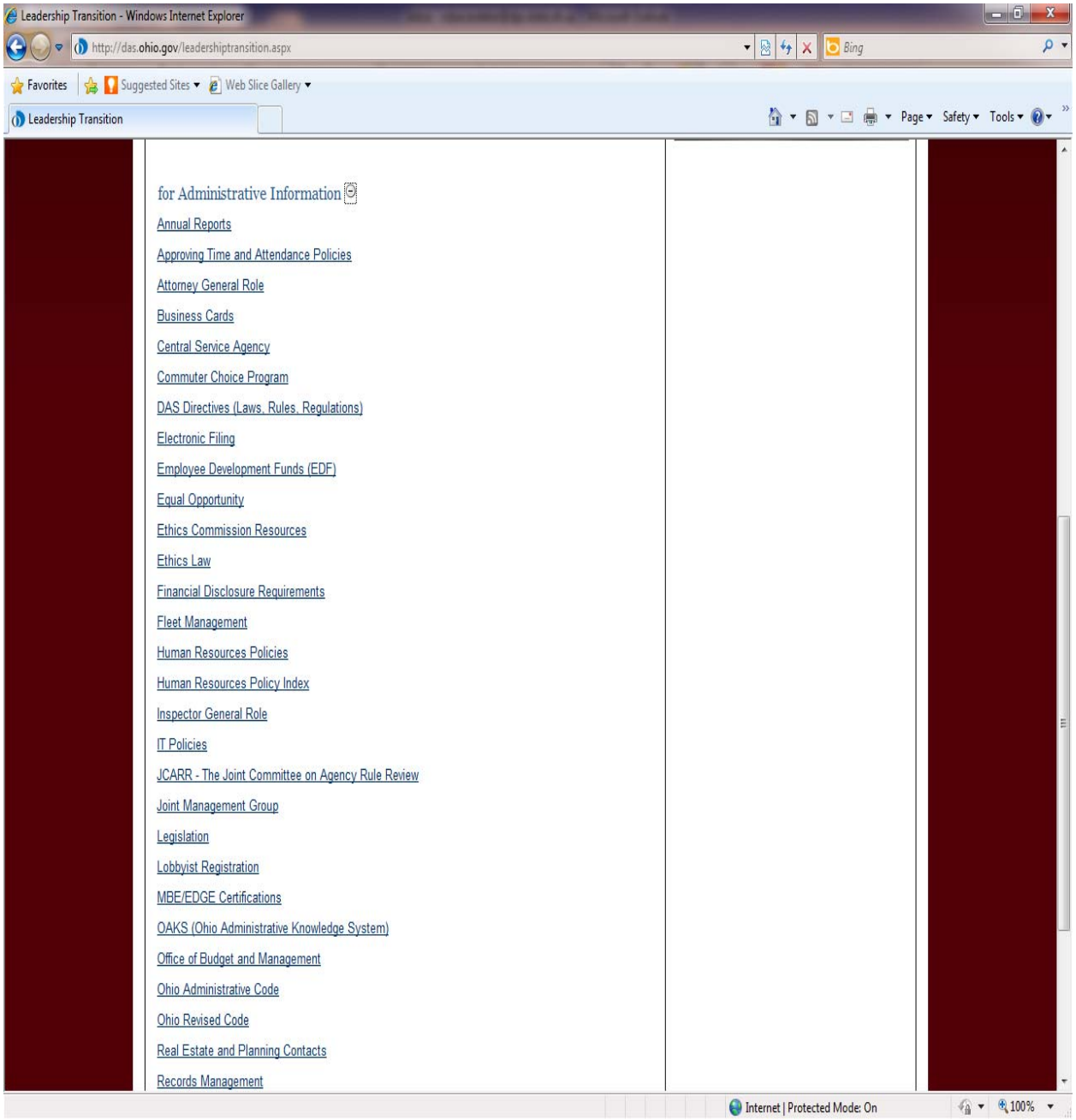
URL**:** Production URL http://das.ohio.gov/leadershiptransition.aspx should be maintained and updated by DAS webmaster.

[D] Webpage Screen shots

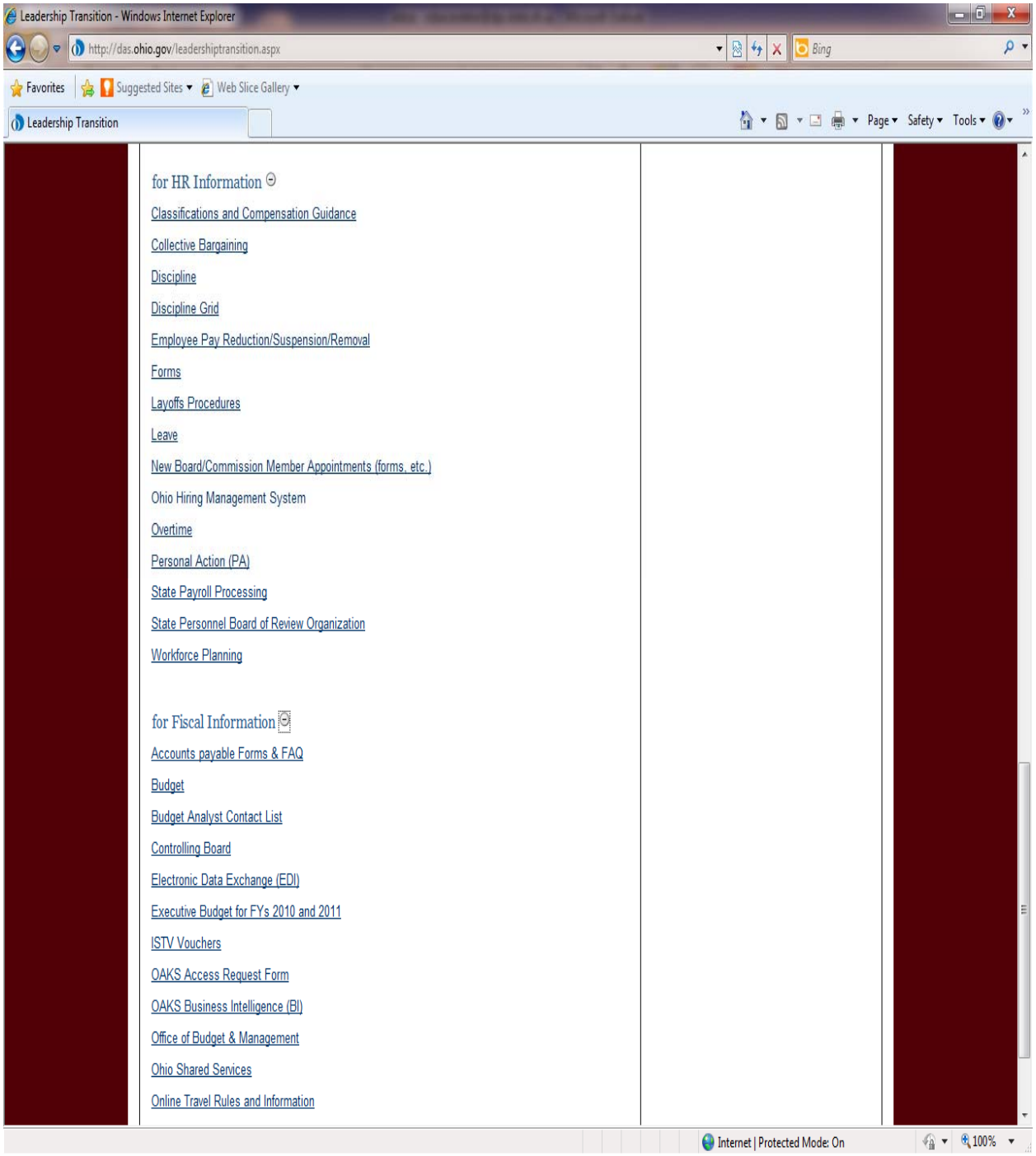
Webpage URL: http://das.ohio.gov/leadershiptransition.aspx



Administrative Information on the webpage



HR Information/Fiscal Information on the webpage



Welcome

We recognize that state agency leadership transitions routinely.

New leaders need guidance to learn about their new roles, responsibilities and resources.

This site contains valuable resources that will direct you to examples, forms, policies and Ohio Revised Code.

http://das.ohio.gov/leadershiptransition.aspx

Pass it on ...

Save this information
to share with your fellow
state employees in
transition

OhioDAS Service · Support · Solutions | Department of Administrative Services

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Columbus, Ohio 43215

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Fax: 614.644.8151

Ohio Department of
Administrative Services

Leadership Transition

das.ohio.gov

Leadership Transition

http://das.ohio.gov/leadershiptransition.aspx

Ohio Department of Administrative Services

for Administrative Information

- Annual Reports
- Approving Time and Attendance Policies
- Attorney General Role
- Business Cards
- Central Service Agency
- Commuter Choice Program
- DAS Directives
- Electronic Filing
- Employee Development Funds (EDF)
- Equal Opportunity
- Ethics Commission Resources
- Ethics Law
- Financial Disclosure Requirements
- Fleet Management
- Human Resources Policies
- Human Resources Policy Index
- Inspector General Role
- IT Policies
- JCARR - The Joint Committee on Agency Rule Review
- Joint Management Group
- Legislation
- Lobbyist Registration
- MBE/EDGE Certifications
- Office of Budget and Management
- Ohio Administrative Code
- Ohio Administrative Knowledge System (OAKS)
- Ohio Revised Code
- Real Estate and Planning Contacts
- Records Management
- State of Ohio Policies
- Union Education Trust
- Use of State Vehicles
- Working for the State

for HR Information

- Classifications and Compensation Guidance
- Collective Bargaining
- Discipline
- Discipline Grid
- Employee Pay Reduction/ Suspension/Removal
- Forms
- Layoffs Procedures
- Leave
- New Board/Commission Member Appointments
- Ohio Hiring Management System
- Overtime
- Personal Action (PA)
- State Payroll Processing
- State Personnel Board of Review Organization
- Workforce Planning

for Fiscal Information

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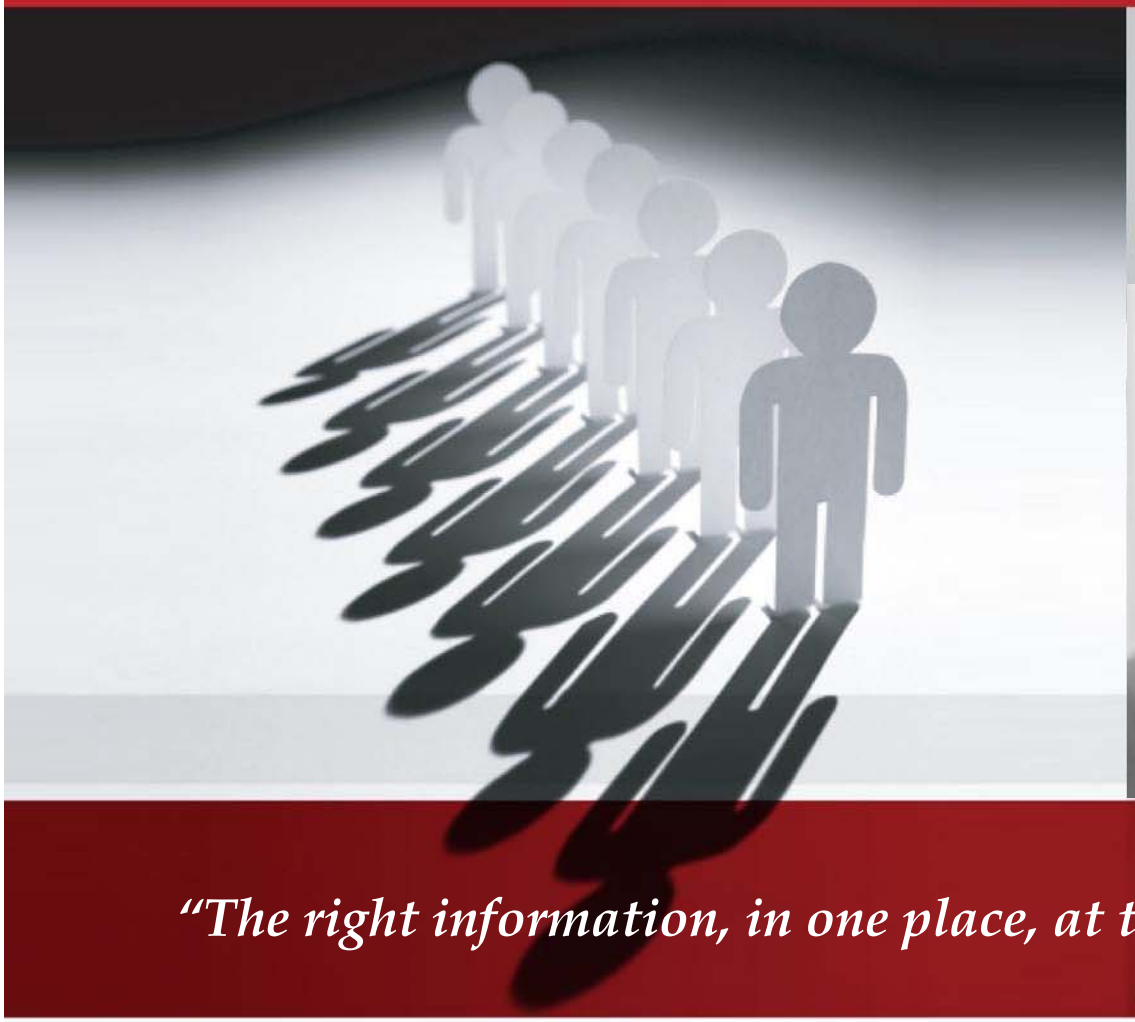
- OAKS Access Request Form
- OAKS Business Intelligence
- Office of Budget & Management
- Ohio Shared Services
- Online Travel Rules and Information
- Requisition Approval Tutorial
- State Procurement
- Travel and Expense

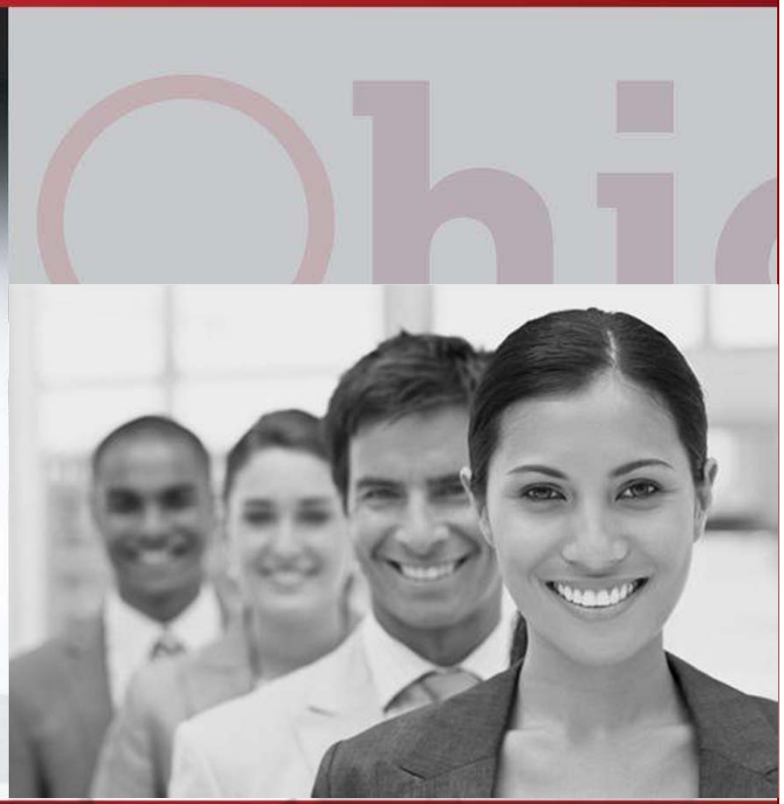
For any changes or updates to this information, please contact the webmaster at webmaster@das.ohio.gov

... Best of luck in your new role!

Ohio's Leadership Transition Resources

Support for new Leaders within State Agencies





"The right information, in one place, at the right time."

Ohio

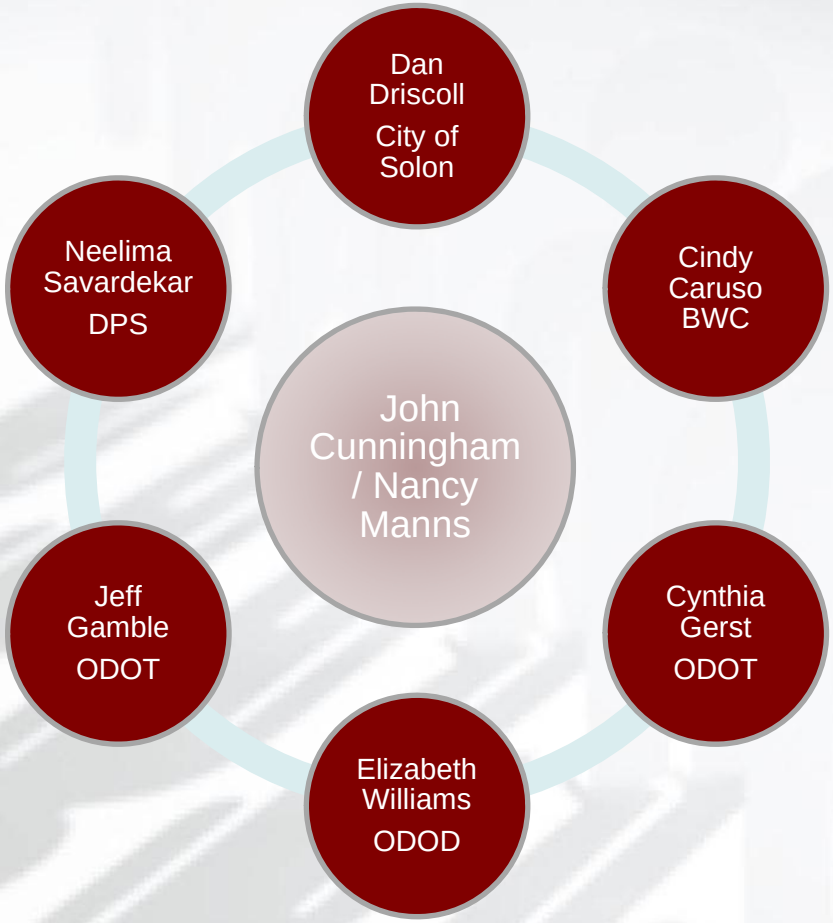
Ohio Certified Public Managers

February 2012

Agenda

- **Introduction**
- Project Goal & Vision
- Project Action Plan
- Project Information Gathering & Analysis
- Project Execution
- Tour of Leadership Resources
- Project Benefits
- Reflections
- Q & A / Wrap-up

Team Introduction



Project Sponsors

John	Had clear expectations on boards and commissions needs. He provided requirements and helped us define the project.
Nancy	Offered feedback on the requirements from various Boards and Commissions.

Agenda

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Project Need

In Ohio, each administration change results in new leaders within agencies and boards.

The Big Question

- *Do these new leaders know their fiscal, HR, and administrative responsibilities?*

Ohio

Project Goal

Develop a webpage that identifies agency responsibilities, and provides direction as how to meet them.

Vision

Consistent & Comprehensive Information

In One place

For New Leaders

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Project Action Plan

- Define team roles
- Sponsor meeting
- Project Charter and Schedule
- Engage OIT resources
- Build site

Defined Roles

Project Lead

Neelima

Project Coordinator

Cynthia

Business Analysts

Dan and Jeff

Technical Resources

Cindy and Elizabeth

Sponsor Meeting

Project discussion

What is the need?

What has been defined?

Project Charter and Schedule

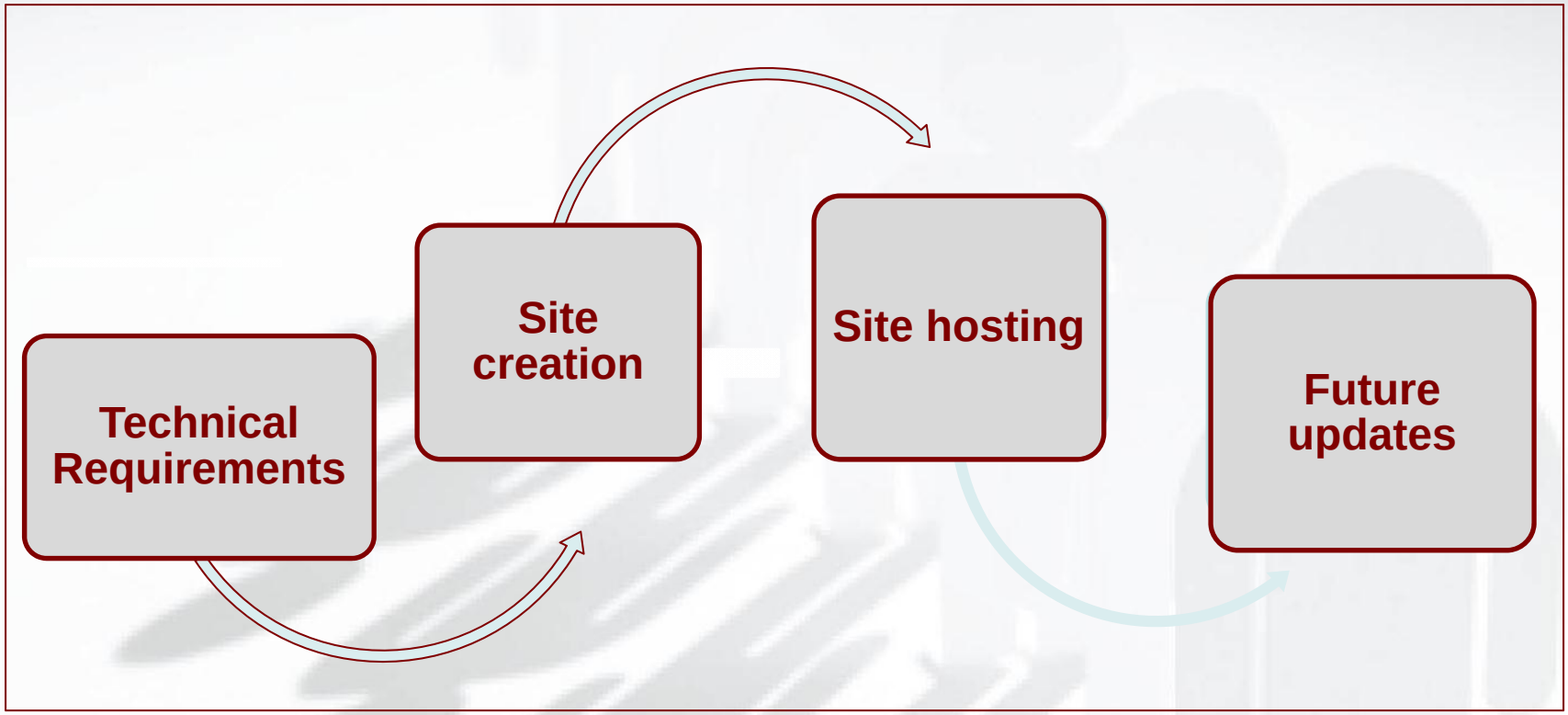
Use Project Management concepts and tools

Create a charter draft

Validate our charter with sponsor

Define a project schedule

Engage OIT Resources



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Information Gathering

All Hands	Second Level Review	Final Compilation
• Divided concepts • Internal agency research • Ohio resource searches	• Shared lists • Sponsor direction • Presenting several options	• Eliminated duplication • Filled in gaps • Balanced perspective

Information Analysis

Strengths

Team abilities
Cohesiveness
Data availability

Weaknesses

Sponsor Transition
Site ownership

SWOT

Opportunities

New Hire Resource
Controlled test environment

Threats

Agency ownership
Future link updates

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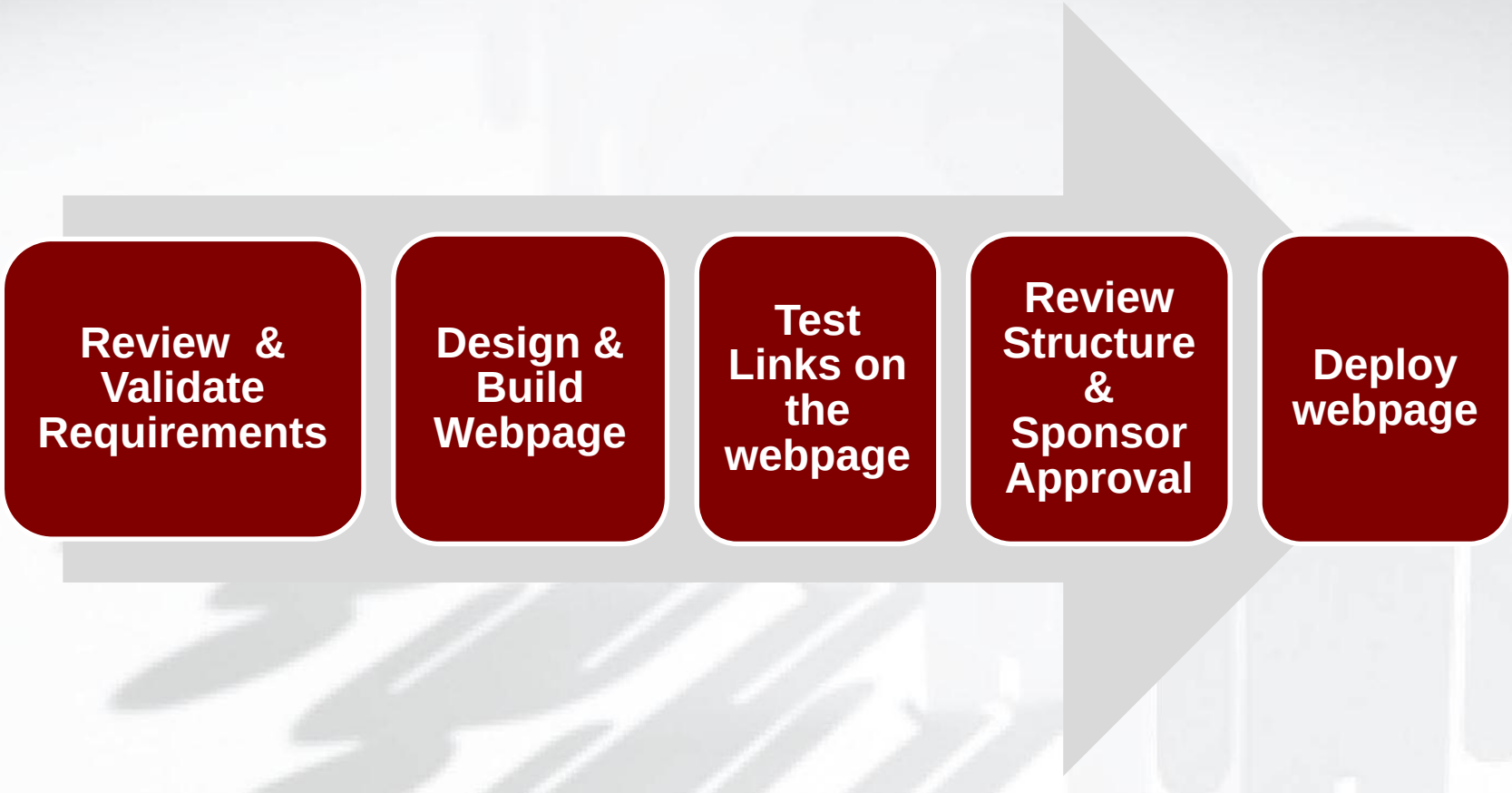
Project Execution



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Ohio Leadership Transition Handbook

Welcome to Department of Administrative Services

Leadership Transition

Welcome

The Ohio Certified Public Managers (OCPM) group created this site recognizing that state agency leadership transitions routinely. New leaders need guidance to learn about their new roles, responsibilites and resources. These links will direct you to examples, policies and Ohio Revised Code. Best of luck to you in your new role.

General Contact

Director's Office
Jackie Murray, Executive Secretary
30 E. Broad St., 40th Floor
Columbus, Ohio 43215
614.466.6511
Jackie.Murray@das.state.oh.us

Driving directions

OCPM-44 Project Team Members

Cindy Caruso
Dan Driscoll
Jeff Gamble
Cynthia Gerst
Neelima Savardekar
Elizabeth Williams

*For any changes or updates to this link please contact the webmaster at webmaster@das.ohio.gov

Ohio

Welcome

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for Administrative Information ⊕

for HR Information ⊕

for Fiscal Information ⊕

for HR Information

- Classifications and Compensation Guidance
- Collective Bargaining
- Discipline
- Discipline Grid
- Employee Pay Reduction/Suspension/Removal
- Forms
- Layoffs Procedures
- Leave
- New Board/Commission Member Appointments (forms, etc.)
- Ohio Hiring Management System
- Overtime
- Personal Action (PA)
- State Payroll Processing
- State Personnel Board of Review Organization
- Workforce Planning

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Project Benefits

State employees want to do the right thing

Information	Access

One site to provide direction to new leaders

Direction to existing resources

Planned sustainability through DAS ownership

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Success Factors

- We were able to succeed through:
  - Clear project definition
  - Clear role definition
  - Existing resources
  - Sponsor engagement
  - DAS OIT support

Team Dynamics

We had diversity in many aspects:

- MBTI
- Functional expertise
- Work background

OCPM Application

- Reinventing Government
- Building and Leading Teams
- Effective Presentations
- Project Management
- Managing for Continuous Improvement
- Communication Skills for Managers

QUESTIONS & ANSWERS

Ohio