

6th Annual National Child Welfare IT Manager's Meeting

Social Services Projects - Resource
Estimation Challenges

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Social Services / Case Management

- Resource Estimation Challenges
- RFP Approaches
- Resource Estimations / Team Mixture
- Estimation Techniques
- Staffing Success
- Drivers of Effort
- Questions

Resource Estimation Challenges

- RFP complexities continue to grow
- Projects are becoming more and more complex
 - Business / Hardware / Software / Tools
- Length of projects
- Mixture of Client and Vendor personnel

RFP Approaches

- Phased RFP's
 - Package Selection
 - Phased Implementations - smaller elements of work
 - Requirements
 - Design
 - Implementation services
 - Support and Maintenance
- Integration RFP's
 - Multiple Year
 - Multiple Releases / Activities / Overlapping Tasks

Resource Estimations / Team Mixture

- Identification of Resource Assignments
 - Management Team
 - Executive Leadership
 - Project Management
 - Oversight Management
 - Business Team
 - SME's
 - Business Analysts
 - Technical Team
 - Architects / Application and Technical
 - Developers, Tools Support team members\
 - Trainers
 - Other Business Partners

Estimation Techniques

Approach	Commentary
We did it before	Most Reliable information - provided you have previously undertaken a similar project. Estimates are based on the actual results from similar engagements.
Guess (estimation by analogy) SWAG	Looking for similar experiences from which you can make direct estimates, or from which you can extrapolate and estimate bearing in mind what specific difference there are in the proposed project.
Structured knowledge base of past experience	This uses the concept of estimation by analogy but builds a structured knowledge base that is used to accumulate experiences from many projects. The key to its success is an intelligent way of classifying and quantifying the many variables that affect the time and effort.

Estimation Techniques cont...

Approach	Commentary
Top Down	Once you have established a good overall estimate for the project you sub-divide it down through the layers of the work breakdown structure. For example, development will be 50% of the total, testing will be 25% etc; then sub-divide development and testing into their components, etc.
Bottoms Up	Each individual piece of work is estimated on it own merit. These are then summed together to find the estimated efforts for the various summary level activities and overall project.
Top-Down meets Bottom-Up	An overall estimate is calculated for the project. Individual estimates are then calculated, or drawn from previous plans, to represent the relative weights of the tasks. The overall estimate is then apportioned across the various summary and detailed level tasks using the bottom-up figures as weights.

Staffing Success

- Will the client participate actively in the project?
 - Helps reduce overall man effort
 - Starts knowledge earlier
 - Are the risks worth it?
- Team Chemistry
 - Critical for success that the team works well
 - Deep experience vs. Attitude
- Staffing Transitions
 - Long term projects

Drivers of Effort

People	Process	Technology
<ul style="list-style-type: none"> ▪ Strength of sponsorship ▪ Availability of good resources for the project team ▪ Organizational resistance to change ▪ Organizational Culture ▪ Morale ▪ Local Cultures ▪ Ease of Communication ▪ Number of locations involved ▪ Number of departments to be affected ▪ Number of staff to be affected ▪ Amount of training required ▪ Impact on external people (clients, providers, etc...) 	<ul style="list-style-type: none"> ▪ Number and complexity of processes to be re-engineered ▪ Extent to which processes are intertwined ▪ Extent to which the process is within the control of the project Sponsor ▪ Degree of improvement required (eg 10% faster is easy; 90% faster will be more of a challenge) ▪ Quality of support for these processes from commercially available software products ▪ Availability of best practice knowledge concerning the processes within a particular industry 	<ul style="list-style-type: none"> ▪ Functionality of IT system ▪ Complexity of the technology to be used ▪ Development techniques and languages to be used ▪ Use of packaged software or component based technology ▪ Amount and complexity of integration and interfacing with legacy systems ▪ Familiarity of development staff with the technology to be used ▪ Productivity of development staff ▪ Desired quality of solution ▪ Acceptable risk levels - eg depth of testing required ▪ Level of documentation required

