## STAFF REPORT

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| **Agenda Item:** | 10 | **Name:** | Jenny Giambattista |
| **Proposed No**.: | 2016-0452 | **Date:** | January 25, 2017 |

**SUBJECT**

A motion approving the Business Intelligence (BI) Project Training Strategy Report.

**SUMMARY**

Ordinance 18289, adopted in April 2016, approved $10.5 million for the purchase of an integrated Business Intelligence (BI) Analytics tool. The ordinance included a proviso requiring the transmittal of a report on the user training strategy for the BI Analytics tool. The transmitted report meets the requirements of the proviso.

The County’s BI project team has developed a training curriculum that is customized for King County. It is based on industry best practices and uses internal subject matter experts to develop and test the content and training for the BI Analytical tool. Consistent with best practices, training and access to the BI product will be staggered (120 new users a month) in order to allow the BI team to provide adequate support to the new users. The content and training for the BI product will be released in three phases during 2017 and 2018.

Subsequent to transmittal, Council staff requested additional clarifying information and an updated timeline for training. The additional information is attached to this staff report (Attachment 3).

**BACKGROUND**

In April 2016, the Council approved Ordinance 18289, a supplemental appropriation of $10.5 million to the Business Resource Center for an integrated Business Intelligence Analytics tool. (There were two prior appropriations totaling $3.8 million.) This BI Analytics tool is expected to replace a financial reporting tool (Oracle Discoverer) that will no longer be supported, and to add additional analysis and reporting capabilities across the countywide finance, human resources, and budget systems.

The benefits of the BI Analytical tool can only be achieved if the users of the product are well trained in how to use it. Therefore, the ordinance was amended in committee to include a proviso requiring the Executive transmit a report on the user training strategy for the BI Analytics tool. The proviso language is listed below:

*Of the appropriation for capital project 1126545, DES-BRC: BI Reporting Solution*

*$100,000 shall not be expended or encumbered until the executive transmits a report on a strategy for user training for the business intelligence project and a motion accepting the report, and the motion is passed by the council.  The motion shall reference the subject matter, the proviso's ordinance, ordinance section and proviso number in both the title and body of the motion*

*The report shall include, but not be limited to:*

1. *Identification of specific training goals and strategies;*
2. *A training implementation plan that includes information on the training approach and specific roles of those involved;*
3. *A matrix of the project tasks and responsibilities that identifies those who are responsible for each task, those who approve the task and those who will be consulted and informed on the process.  This matrix should address a number of high level tasks that shall include, but not be limited to;*
4. *Identifying desired training methods and specific media;*
5. *Identifying specific training curricula;*
6. *An estimate of training development tasks and efforts;*
7. *Identifying program baseline metrics and targets; and*
8. *Identifying a schedule to deliver user trainings.*

*The executive must file the report and motion required by this proviso by September 1, 2016, in the form of a paper original and an electronic copy with the clerk of the council, who shall retain the original and provide an electronic copy to all councilmembers, the council chief of staff, the policy staff director and the lead staff for the budget and fiscal management committee, or its successor.*

Because this proviso was placed on the capital project, the $100,000 will continue to be restricted until the Council passes Proposed Motion 2016-0452.

**ANALYSIS**

The transmitted training strategy meets the requirements of the proviso. Subsequent to the transmittal, some of the information in the report needed to be updated to reflect new timelines and information. The training timeline provided in the transmitted report has been delayed by two months due to additional time needed for hardware installation. Updated information provided by Executive staff is included as Attachment 3. This staff report integrates the transmitted report and the updated information in order to present the most up to date summary of the training strategy.

**Training targets two types of users**

The BI tool is expected to be used by about 1,200 BI users. The BI project team will target training towards two user groups: BI Consumers and Power Users. BI Consumers (about 90 percent of BI users) are users who will log in and view the prebuilt dashboards and report content. (A dashboard is a pre-built user friendly display of data.) Executives, Division Managers, and Project Managers are all considered BI users and would use the system to monitor performance. Power Users (5 to 10 percent of BI users), are a subset of BI consumers who will receive more in-depth training, will learn how to build dashboards and reports for the BI Consumers.

According to executive staff, to ensure successful adoption of the BI program, the introduction of BI training and usage into King County should follow best practices and start small and gradually add business units and users. Accordingly, training and access to the BI product will be staggered (120 new users a month) in order to allow the BI team to provide adequate support to the new users.

**Training Methods**

Based on user preferences and industry best practices, the Basic “BI Consumer” training will be delivered via on-line training videos. These videos were developed by the BI Project team and are customized using King County developed dashboards and data. The videos are hosted by Skillsoft, a platform for hosting training videos. Skillsoft allows the County to track who has watched the training videos. The initial, required introductory training is approximately 1 hour in length.

Additionally, the BI project will offer one-on-one consultations and “lunch and learn” sessions and offer regular office hours for new users to drop in and get additional support.

The power user training will consist of small, instructor led training sessions.

**Pilot Group**

Based on industry best practices, the BI project will assemble a pilot group of users to develop the dashboards and training. As part of the strategy, a pilot group of users will test out the content and training materials before they are released to a larger group of users. The participants in the pilot group will change according to the need for subject area expertise. This model allows for refinement and enhancements for subsequent releases.

**The BI Analytics Tool will be Released in Three Phases:**

**Release 1:** The content of Release 1 will include dashboards related to finance and General Ledger (GL) data focused for budget versus actual analysis and GL revenue and expense detail analysis. The training for Release 1 will include an introductory one hour BI training video and training videos for each of the five to seven dashboards. The pilot group will test the Release 1 products and training videos in January and February 2017 and will provide feedback to the BI project team. After making any necessary changes, Release 1 will then go live by March 11, 2017 for the pilot group only.

By April 15, 2017 the initial one-hour video training will be available on a staggered schedule to users in the agencies listed below. Once a user completes the introductory video training, he/she will be granted access to the BI tool. Each additional dashboard will have its own video explaining its purpose and how to use it.

Finance and Business Operations

Department of Natural Resources and Parks

Department of Public Health

Department of Transportation

Department of Public Defense

King County Sherriff’s Office

King County Information Technology

Office of Performance, Strategy and Budget

Business Resource Center

Each county agency has identified a point of contact who is responsible for determining which employees receive training. The BI product team anticipates users in all of the above agencies will be trained in Release 1 content by June 2017 and then access to the training will be made available to users in remaining County agencies in June 2017.

Power User training will be available to all users in June 2017 and will be instructor led.

**Release 2:** The second release includes additional content for General Ledger, projects, budgets, procurement, payables, receivables and fixed asses revenue and expense detail for procure-to-pay and billing-to-cash process analysis.

Similar to the process for Release 1, a pilot group will be formed with the relevant subject area experts to review all of the dashboards and training videos for Release 2 prior to general release. The BI consumer training videos for Release 2 will be released and available to anyone who has taken the basic introductory training. The project expects to be completed with the initial Release 2 trainings by September 2017.

**Release 3:** The third release will include additional financial content and human resource (HR) analytics: employee demographics, diversity, position management, leave and time, compensation and retention analysis.

Similar to Release 1 and 2, a new pilot group will be formed with HR expertise to provide input on the content for Release 3 and the training videos prior to general release. The BI consumer training videos for Release 3 are expected to be ready for the pilot users in January and February 2018 and then access to the content of Release 3 and training videos will be available by March 2018 to any user who has taken the introductory video.

**Ongoing Training**

The BRC expects to continuously develop new dashboards and reports as needed and a training video for each new one. All future dashboards and training videos will receive subject matter expert review and testing prior to release.

**ATTACHMENTS**

1. Proposed Motion 2016- 0452 (and its attachments)
2. Transmittal Letter
3. Responses to Council staff questions

**INVITED**

1. Rita Popp, Enterprise Resource Planning Project Manager, Business Resource Center
2. Caroline Whalen, County Administrative Officer, Department of Executive Services
3. Helene Ellickson, Budget Manager, Office of Performance, Strategy, and Budget