



**City of Tampa
Efficiency and Effectiveness Task Force
Initiative**

Implementation Model

Version 4.1

Prepared 5/9/2008

City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative

1. Identify and appoint Task Force members (Proven Change Agents).
 - a. Cross functional representation from all areas
 - b. "Out of the box" thinkers
 - c. Carefully selected leader > Dynamic visionary/change agent
 - d. Delegate responsibility/authority to the team
 - e. Team must understand that speed and follow-through are essential
2. Brainstorm ideas among Task Force members.
 - a. Expect participation by all Task Force members
 - b. Encourage ideas from the workforce at large
 - c. Guide (provide focus) but don't limit scope of ideas
3. Select feasible ideas for implementation.
 - a. Establish criteria for idea selection at the outset ([Attachment A](#))
 - b. Be practical but allow some "big thinking"
 - c. Steer clear of multi-year ideas initially (a couple of months to two years is recommended)
4. Gather initial information regarding feasible ideas
 - a. This is a very rough first cut Brainstorm Ideas ([Attachment B1](#))
 - b. Don't be too specific – this is just to start group thinking
5. Select an initial set of ideas for further work.
 - a. Target the highest Return On Investment (ROI) ideas first ([Attachment C](#))
 - b. Make sure to select several ideas that will have short implementation periods (people want to see progress rapidly)
 - c. Select some ideas with very visible "payback" results (people want to know you're getting good results)
6. Assign a Task Force member to sponsor each Action Team
 - a. Min. Quals: Dynamic, collaborative communicator and invested change agent
 - b. Ensure sponsors dedicate the necessary time to provide assistance
 - c. Instruct sponsors not to "over manage" the Action Teams
 - d. Ensure sponsors maintain standards and consistency in team actions
 - e. Encourage sponsors not to become the team "speakers"; give the team leaders the chance to become more visible
7. Choose Action Team leaders/members for each of the selected ideas
 - a. Pick personnel with significant expertise in the areas affected
 - b. Ensure all affected parts of the organization are included on the team
 - c. Make sure the team leader is open to change

City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative

- d. In addition to multi-level department resource members, team membership should include:
 - i. Expertise from accounting/legal/human resources/purchasing and
 - ii. Representatives from peer organizations facing similar challenges or engaged in similar practices.
 - e. Ensure the team understands what is expected of them before they begin
 - f. Task Action Teams to develop high-level strategy and scope of effort ([Attachment D1](#)).
8. Conduct a business case analysis on selected ideas.
- a. Use a standard format ([Attachment E2](#))
 - b. Educate Action Teams before they undertake the business analysis
 - c. Ensure that alternate approaches are considered and pros/cons weighed
 - d. Ensure that key performance/results indicators are identified
 - e. Perform a “mini audit” before presenting results to management
 - i. Request assistance from Internal Audit
9. Conduct a formatted review for senior management.
- a. Use a standard format ([Attachment F](#))
 - b. Ensure firm milestones are set
 - c. Ensure very specific recommended actions are listed
 - d. Note any external assistance the team needs for success
 - e. Stay focused on results and be prepared to answer management’s questions
 - f. Implementation costs are one-time costs and should include salaries from research/development through implementation, expenses...
 - g. Cost Savings should be annualized.
10. Down select idea list, if necessary, and conduct further data analysis.
- a. Deselect ideas that don’t produce sufficient results fast enough or positive ROI
 - b. Use management judgment regarding highly sensitive ideas
 - c. Further research and flesh out estimates and timing
 - d. Perform a “mini audit” before presenting to organization head
11. Present recommendations to organization head.
- a. Use a standard format ([Attachment G](#))
 - b. Ensure teams standardize estimates and timing
 - c. Don’t get bogged down in details
 - d. Be ready to move quickly once ideas are approved
12. Build a detailed implementation plan for each idea.
- a. Plans must include: ([Reference: PM Guidelines](#))
 - i. Strategy for implementation (rollout plan)
 - ii. Affected parties/organizations

City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative

- iii. Manpower requirements
 - iv. External assistance needed
 - v. Detailed timelines, with dependencies
 - vi. Evaluation/Approval Gates
 - vii. Authorization requirements
 - viii. Metrics (Definitions and how measured)
 - ix. Expectations of results (tie to metrics)
 - x. Communication Plan
- b. Hold formal kickoff sessions and provide training
 - c. Ensure all affected parties understand what to expect
 - d. Ensure implementation team is aware of organizational policies and procedures

13. Execute implementation plans.

- a. Empower strong implementation leaders (someone other than Action Team Leader could be selected)
- b. Dedicate staff time to get the job done on schedule
- c. Elevate issues to management before they become severe
- d. Formalize plan/schedule changes, but only if the change is mandatory

14. Conduct progress/results reviews during/after implementation.

- a. Use a standard format ([Attachment H](#) or other)
- b. Conduct every three months for the first year (longer if needed)
- c. Document lessons learned

15. Make Efficiency and Effectiveness a “Way of Life”

- a. Use lessons learned to improve future implementation processes
- b. Train and involve every member of the workforce
- c. Constantly capture metrics that show the positive results of E&E
- d. Cultivate a culture that places E&E activities high on the priority list

City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative

Attachment A

Analysis Considerations

- **Technically/Managerially/Politically Implementable**
 - Significant ROI
 - *Cost Savings*
 - *Time savings*
 - *Personnel savings*
 - *Operational savings (including downsizing)*
 - *Revenue generation/improvements*
 - Resource availability
 - *Are there too many competing efforts in progress to effectively allow resource assignment to this project*
 - Political Environment
 - *Climate Readiness*
 - Dependencies
 - *e.g. CIP, Other Agencies, Policies, Primary Projects*
- **Return on Effort** (Efficiency being a function of effort & result)
 - Timing of Implementation (can it be finished before the effort is overcome by events?)
 - Significant Efficiency/Optimization
 - Measurable Effectiveness
- **Mandatory/Critical Application** (*e.g. Mandates, Legal Considerations*)

City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative

Attachment E2 – Business Case

Strategy/ Scope

Minimum content needed for this section: description of the business need and its contribution to the organization's business strategy, objectives, why it is needed now, key benefits to be realised, key risks, critical success factors and how they will be measured; main stakeholders.

Questions you may address at this time:

- How well does the proposed way of meeting the requirement support the organization's objectives and current priorities? Why it is needed now
- Key benefits to be realised - If it is a poor fit, can the scope be changed?
- Is the project needed at all?
- Have the stakeholders made a commitment to the project?
- Critical success factors and how they will be measured.

Create Executive Summary Business Case

Purpose: To provide a concise summary of the key highlights of the business case analysis, providing an understanding of what the project is about, the role of the project in organization's business plans/direction and the business justification. The summary should clearly state how the project improves the overall efficiency and effectiveness of the organization.

Note: While this appears first, it should be written last. It is the single most important communication to capture attention and obtain support.

If possible, the Executive Summary should be a maximum of two pages in length.

Checklist for Executive Summary:

1. Will the reader get a clear understanding of the reasons for the project and its outcome by outlining the "Why, What, When, Who, and How" of the project?
2. Does it contain any information that is not contained in the body of the business case?
3. Is the Executive Summary less than two pages?

City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative

4. Can the Executive Summary be treated as a stand-alone document?

Benefits vs Risks

Minimum content needed for this section: high level cost/benefit analysis of (ideally) at least three options for meeting the business need (where applicable); include analysis of 'soft' benefits that cannot be quantified in financial terms; identify preferred option and any trade-offs. Note that options appraisal must be carried out in detail before selecting a preferred option.

Questions you may address at this time:

- Has a wide range of options been explored?
- Have innovative approaches been considered and/or collaboration with others?
- If not, why not?

Stumbling Blocks

What are the known/perceived challenges to moving the initiative forward?

Authorizations

Establish authorization responsibilities by role: Project, Risk, Policy, Milestone acceptance...

ROI / Funding

Affordability: Statement of available funding and 'ballpark' estimates of projected whole-life cost of project including departmental costs (where applicable).

1. Minimum content required for this section: proposed sourcing option, with rationale for its selection; key features of proposed arrangements (e.g. contract terms, contract length, payment mechanisms and performance incentives); the procurement approach/strategy with supporting rationale, etc.

Questions you may address at this time:

- Can value for money be obtained from the proposed sources (e.g. partners, suppliers)?
 - If not, can the project be made attractive to an alternative method?
2. Minimum content for this section: statement of available funding and broad estimates of projected whole-life cost of project, including departmental costs (where applicable).

City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative

Questions you may address at this time:

- Can the required budget be obtained to deliver the whole project?
- If not, can the scope be reduced or delivered over a longer period?
- Could funding be sought from other sources?

Milestones

Minimum content for this section: high level plan for achieving the desired outcome, with key milestones and major dependencies (e.g. interface with other projects); key roles, with named individual as the project's owner; outline contingency plans e.g. addressing failure to deliver service on time; major risks identified and outline plan for addressing them; provider's plans for the same, as applicable, skills and experience required.

Questions you may address at this time:

- Can this project be achieved with the organization's current capability and capacity?
- If not, how can the required capability be acquired?
- Can the risks be managed – e.g. scale, complexity, uncertainty?
- Does the scope or timescale need to change?

Escape Plan

Outline contingency plans

What approach will be put in place to progress/stop the project from moving forward once it is underway if the team feels it's not a good fit?

Communication Plan

Matrix Communication Plan: When, Who, Who, What

City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative

Attachment G – Quad Chart

EETF ACTION ITEM # X

10/30/07

TITLE OF ACTION ITEM

| | |
|---|--|
| <p style="text-align: center;">DESCRIPTION OF INITIATIVE</p> <ul style="list-style-type: none"> • ADD TEXT TO DESCRIBE THE IDEA OR PROBLEM BEING ADDRESSED • GO BEYOND THE TITLE OF THE ACTION ITEM WITH THIS DESCRIPTION BUT KEEP THIS DESCRIPTION WITHIN THIS UPPER LEFT QUADRANT | <p style="text-align: center;">RECOMMENDED ACTIONS</p> <ul style="list-style-type: none"> • DEFINE THE SPECIFIC ACTION(S) RECOMMENDED TO ADDRESS THE IDEA OR PROBLEM. USING ONE SINGLE BULLET TO COMPLETE THIS QUADRANT IS ACCEPTABLE |
| <p style="text-align: center;">MILESTONES</p> <ul style="list-style-type: none"> • STEP 1 (TEXT) 15 SEPT • STEP 2 (TEXT) 10 OCT • STEP 3 (TEXT) 30 OCT • STEP 4 (TEXT) 15 NOV • "ACTION COMPLETE" 10 DEC | <p style="text-align: center;">FINANCIAL ANALYSIS</p> <p>IMPLEMENTATION COST: \$XXXXX</p> <p>ESTIMATED SAVINGS:</p> <p style="padding-left: 20px;">HARD CASH \$ XXX/YR</p> <p style="padding-left: 20px;">LABOR SAVINGS (SOFT \$) \$ XXX/YR</p> <p style="padding-left: 20px;">COST AVOIDANCE \$ XXX/YR</p> <hr style="width: 80%; margin-left: 0;"/> <p>TOTAL SAVINGS PER YEAR \$ XXXX/YR</p> |

**City of Tampa
Implementation Model
for an
Efficiency and Effectiveness Task Force Initiative**

Attachment H – Progress Results

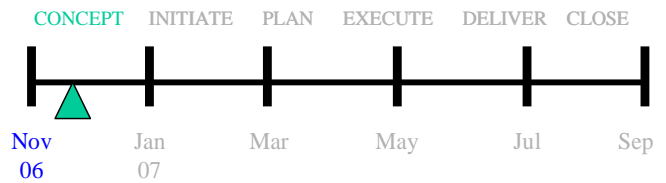
AntiSpam Capability (104051)

**Sponsor: Jim Levin
Parks & Rec**

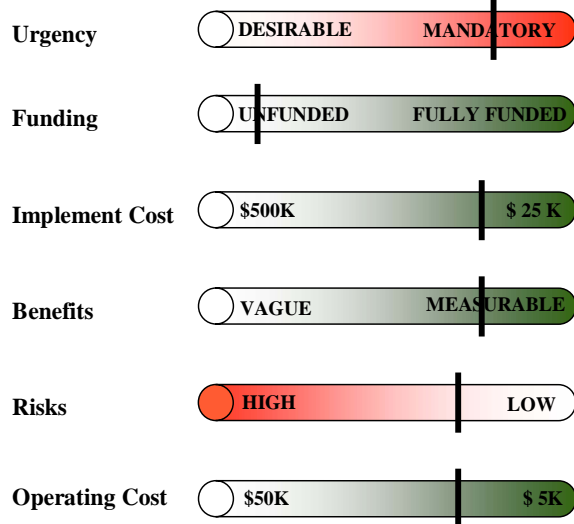
Requirement

- Purchasing of the Premium AntiSpam Add-On to Symantec Mail Security for SMTP and MS Exchange
- This solution is operational at 9 of the top 13 internet service providers in the U.S.

Timeline



Current Status



Way Ahead

- ITSC review
- Approval required to move to Initiate Phase
- If not then disposition of request