

TASMANIAN GOVERNMENT  
SERVICE PROVISION FUND  
Project Handbook



**Microsoft®**

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## INTRODUCTION

The intention of a Service Provision Fund (SPF) is to fund projects and proof-of-concept activities that help Microsoft customers realise value from their software investment. Sometimes, this means encouraging innovation within an IT department beset by cost constraints. It may mean trying to integrate products with each other and existing systems in ways that make the sum of the parts greater than the whole. Increasingly, it means connecting systems on the desktop with operational sources of information. In every case, it means making Microsoft products work better within a customer context.

Around the world (and within Australia), Microsoft customers have seen a need to leverage the Microsoft ecosystem of partners to achieve these aims. Tasmanian Government is no exception. The SPF is money intended for the local ICT partners and Government IT staff to work together on projects that make sense for the Government. The SPF is not intended to employ Microsoft to help the Government buy more products. It is also not intended as a general-purpose fund to augment Government IT expenditure. It is specifically intended to materialise return on the investment the Government has made in Microsoft products.

This document has been produced as a guide to the SPF process. Please feel free to speak with any of the SPF contacts should you have any questions.

### SPF Contacts:

Mandy Osnabrugge

Tasmanian Government Account Manager, Microsoft

Email: [mandyo@microsoft.com](mailto:mandyo@microsoft.com)

Belinda Noakes

Services Engagement Manager, Microsoft Enterprise Services

Email: [bnoakes@microsoft.com](mailto:bnoakes@microsoft.com)

## **SPF OVERVIEW**

### **Operating Principles**

The key principles for operating the SPF are:

- Operate simply – focus on understandable, real outcomes
- Establish clear objectives for projects – focus on:
  - proof-of-concept business applications
  - which
  - address whole-of-government requirements and common needs, and facilitate cross-departmental collaboration
- Focus expenditure – funding for services, not hardware or software purchases
- Approve projects – according to agreed criteria and process
- Manage projects – in accordance with the Tasmanian Government project management methodology
- Remain aware of strategic technology directions – especially existing and planned Tasmanian Government ICT investments
- Involve local ICT companies – promoting public/private partnership
- Be accountable to stakeholders – operate transparently
- Govern the fund effectively – Government and Microsoft
- Keep submissions short & simple – 3-page (max), electronic descriptions of candidate projects
- Communicate outcomes – inside and outside of Government

### **Eligibility for Funding**

All inner-budget agencies are eligible to apply for SPF funding.

### **SPF Project Submission Criteria**

The Microsoft Account Manager will review all proposals before they are submitted to the SPF Committee for its consideration. The Committee may need to allocate resources from the SPF to qualify and estimate resource requirements for projects prior to submission for its full consideration.

The Committee will evaluate proposals for whole-of-government projects according to defined criteria, in light of the resources available.

All projects must involve the development of applications or implementation of solutions using Microsoft products, although other platforms and products may be incorporated (eg. integration/interoperation with legacy systems).

Unless exceptional circumstances apply, a project must also satisfy at least two of the following criteria.

The project will:

- i. improve government employee productivity and/or satisfaction.
- ii. develop the local IT industry.
- iii. improve inter-relationships and/or collaboration between government agencies and/or jurisdictions.
- iv. generate substantial efficiencies in government business processes.
- v. generate substantial efficiencies in existing government service delivery activities.
- vi. create new channels for government service delivery, resulting in increased convenience and/or lower costs for clients.
- vii. deliver other substantial benefits to the Government as a whole.

### **SPF Project Proposals**

Proposals should use the template attached as Appendix A and must contain:

- Objective
- Scope
- Reason
- Priority
- Responsible Officer
- Output(s)
- How will the success of the initiative be measured
- Resources
- Estimated Expenditure
- Key Stakeholders
- Major Risks
- Minimising the Risks
- Related Projects
- Guidelines/Standards
- Project Size
- Governance
- Business Partner/Sponsor
- Project Milestones
- Response to Evaluation Criteria
- SPF Funding Sought

All proposals must be endorsed by an agency Project Sponsor. The sponsor should be a senior official of the agency. It is preferable the sponsor is from the Corporate Client business unit and is not the IT Director or CIO.

## SPF PROJECT LIFE CYCLE

Each SPF project will pass through the following life cycle.

### Initiation

An agency employee or a Microsoft Partner contacts the Microsoft Account Manager (AM) with an identified project concept or business problem.

The Microsoft AM:

- helps with preparation of a project proposal (with input from the Microsoft Services Engagement Manager) and
- meets with the Project Sponsor.

### Approval

The Microsoft SEM reviews the proposal using the Proposal Review template (see Appendix B).

The Microsoft AM submits the proposal to the SPF Steering Committee.

The Steering Committee considers the proposal. The Steering Committee may approve or reject a project proposal.

If the proposal is approved the project moves into the procurement phase.

### Procurement

The sponsoring agency is responsible for distributing the project proposal to at least three Microsoft Partner organizations and obtaining quotes for development of the proof-of-concept.

Use the link below to find a list of current Gold and Certified Partners.

<http://directory.microsoft.com/resourcedirectory/Services.aspx>

NOTE: Select **Australia** as the country and then click on the **Services** tab. Fill out the form with the details of the project and the agency.

Quotes should be assessed in light of two major considerations:

- value for money (cost quoted vs conformance with required deliverables)
- industry development contribution (local Partners will be given preference, with consortia including local Partners given second preference).

The sponsoring agency should prepare a short summary of its assessment using the template at Appendix C and forward the assessment to the Microsoft Account Manager. The Microsoft AM will forward the assessment to the SPF Steering Committee.

The Steering Committee will advise the sponsoring agency that the preferred quote is approved. Before Kickoff can commence, Microsoft must complete contractual arrangements with the Microsoft Partner.

Microsoft will receive an allocation equal to 5% of the total SPF funding to cover the costs of administering the fund. This allocation will be drawn down at completion of each project.

### **Kickoff**

Each project commences with a kickoff meeting involving key stakeholders:

- Partner technical lead
- Customer project lead
- Project Sponsor
- Microsoft Account Manager (AM)
- Microsoft Services Engagement Manager (SEM)

The first project activity is development of a Project Business Plan document. The Project Business Plan is developed jointly between the partner and the customer, with input from MCS. Project Business Plans should use the template included as Appendix D.

The Project Sponsor must sign off the Project Business Plan, but the Microsoft Partner is accountable for its completion.

### **Checkpoint 1**

This first project milestone is marked by a casual briefing with the development team, all project stakeholders from the government agency, the Microsoft AM and the Microsoft SEM. The briefing describes what the project is intended to achieve for the agency.

The content of the briefing is drawn from the completed Vision/Scope document. The Microsoft Partner is responsible for organising the briefing and preparing a Status Report using the template included at Appendix E.

### **Checkpoint 2**

The second project milestone is marked by a progress update at the end of the planning stage. It is a casual briefing for the development team, all project stakeholders from the sponsoring agency and Microsoft.

The content of the briefing is largely drawn from the completed detailed requirements documentation. The Microsoft Partner is responsible for organising the briefing and preparing a Status Report using the template included at Appendix E.

### **Checkpoint 3**

The final show and tell event is a more formal presentation of the project outcomes. This is an opportunity to brief key staff within the sponsoring agency, as well as

interested parties from other agencies. The final checkpoint will highlight the final learnings with a focus on re-use and/or deployment opportunities.

The Project Sponsor is invited to open the presentation, which continues with a project demonstration. This is usually a Powerpoint presentation with screen shots of the deliverables (as appropriate).

The Microsoft Partner is responsible for organising the presentation and preparing a Status Report using the template included at Appendix E.

## **Closure**

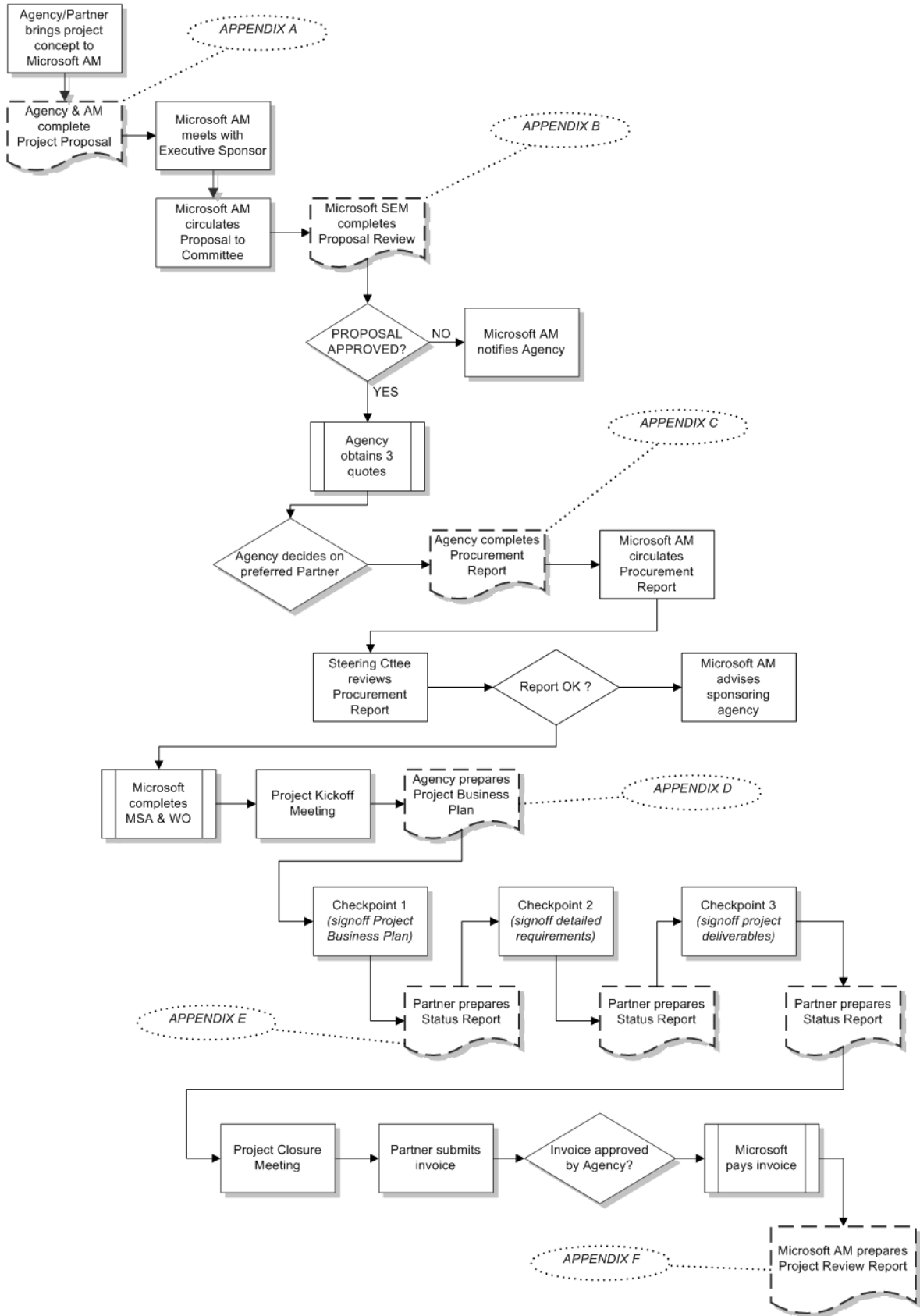
A project closure meeting should be held to wrap up every SPF project. Attendees should include the Project Sponsor, the Microsoft Partner, the Microsoft AM and the Microsoft SEM.

This meeting should cover project highlights and lowlights. The suggested agenda is:

- Did the project meet all of its objectives?
- What went well?
- What didn't go so well?
- What could have been done better?
- Overall experience with the SPF?
- What next?

The Microsoft AM documents the outcomes of the closedown meeting and circulates a Project Review report to the Steering Committee using the template at Appendix F.

The following page shows the project lifecycle in a flowchart diagram.



Tasmanian Government Service Provision Fund Project Lifecycle

## SUMMARY OF ROLES & RESPONSIBILITIES

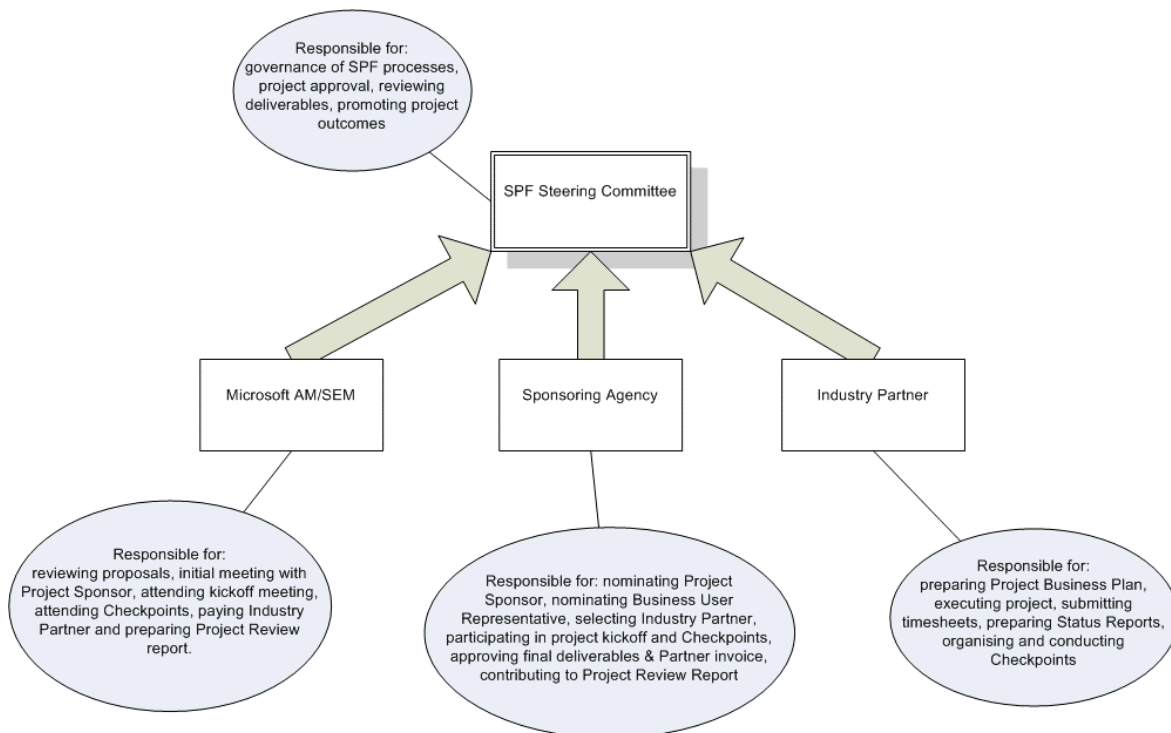
### Role of the SPF Steering Committee

The Steering Committee is responsible for governance of the SPF. The Committee will:

- develop and approve the procedures for allocating and reimbursing SPF funds
- consider and approve applications for SPF funding
- review project outcomes
- promote re-use of project deliverables across the Tasmanian Government
- promote project outcomes both internally and externally to the Tasmanian Government.

The Steering Committee includes representatives from both Microsoft and the Tasmanian Government.

The diagram below depicts roles and responsibilities of the key players in the SPF project lifecycle.



Each project team will include at least these four core roles:

- Microsoft AM
- Microsoft SEM
- Microsoft Partner
- Project Sponsor
- Business Owner Representative

The following table summarises the major responsibilities of the core team members in different phases.

PERSON	Microsoft AM	Microsoft SEM	Microsoft Partner	Project Sponsor	Business Owner Rep.
<b>PHASE</b>					
<b>Initiation</b>	S	R	P	S	P
<b>Kickoff</b>	P	A	P	S	P
<b>Checkpoint 1</b>	P	S	A	P	P
<b>Checkpoint 2</b>	P	S	A	P	P
<b>Checkpoint 3</b>	P	S	A	P	P
<b>Close down</b>	A	S	S	S	P
<b>Post-project Doc</b>	S	P&S	P&S	P&S	P

A – Accountable

S – Sign off

P – Participate

R – Review Required

## Role of the Project Sponsor

Every SPF project has a Project Sponsor. It's important for the Project Sponsor to commit to providing an active guiding role and, in doing so, ensuring that the project is on the right track. Some important tasks for the Project Sponsor are to:

- Identify and communicate the business need
- Involve the people within the agency who will be affected by the solution (eg. business decision makers, users, administrators)
- Nominate a contact person who will liaise directly with the Microsoft AM
- Endorse selection of Industry Partner
- Approve Project Scope
- Approve Critical Success Indicators
- Sign off Kickoff phase
- Project kick off - 5 minute Motivational speech
  - What is the business problem you are trying to solve?
  - What is the current Agency IT Structure?
  - Why this is important to your Agency?
  - How you see this extending beyond your Agency?
  - How this will affect your staff?
  - Which Microsoft Products will be involved?
  - What the outcome will mean to you?
- Commit to 2-3 times during the project life cycle to meet with the Microsoft AM
- Participate in Checkpoint meetings (Communicate business requirement, and how technology will solve it)
- Approve Checkpoint milestones
- Provide feedback to the Microsoft AM on how to do things better
- Project Closedown – 5 minute Motivational speech
  - What you set out to do
    - How your expectations were met and / or exceeded
    - Where you intend to take the proof of concept
- Sign off the project and communicate learnings and outcomes back to the Agency.

## **Role of the Business Owner Representative**

Every project team should involve a Business Owner Representative, who represents the people within the sponsoring agency who will be affected by the project.

The Business Owner Representative will be responsible for communicating the needs of the business users to the SPF team, as well as communicating the project vision, goals and deliverables back to the business users involved.

The Business Owner Representative should be involved throughout the development of the project, to ensure the business user needs are met. This involves:

- Assistance in the development of Project Scope
- Assistance in the development of Critical Success Indicators
- Project Kickoff Phase
  - What is the business user problem that should be solved?
  - What are the business user's considerations?
  - How will they be affected by the proof of concept?
- Assistance in the development of Checkpoint milestones
- Participate in Checkpoints (communicate business users' requirement and how technology will address it)
- Provide feedback to the Microsoft Partner
- Project Closedown
  - How user expectations were met
  - How user expectations were exceeded

## **Role of Microsoft Account Manager**

- Assist agencies and partners with clear articulation of project vision, scope and outcomes
- Manage Project Sponsor relationships
- Manage Project Sponsor expectations
- Update Project Sponsor on project progress
- Obtain feedback from the Project Sponsor e.g. customer satisfaction form

## **Role of Microsoft Services Engagement Manager**

- Brief Project Sponsor on technical details
- Manage industry partner relationships

- Monitor project schedules
- Pursue opportunities for re-use of SPF-developed solutions
- Involve external groups with the project review process

### **Role of Microsoft Business Administration Coordinator**

The Microsoft Business Administration Coordinator is responsible for contractual and financial aspects of SPF projects, including:

- Generation, forwarding & tracking of partner subcontract agreements
- Reconciliation of Partner invoices on project completion or at payment milestones
- Managing subcontractors in Changepoint and reviewing time sheet entries
- Receiving, reconciling and processing invoices covering partner subcontractors.

All queries regarding contracts or financial administration should be forwarded to Belinda Noakes: [бноakes@microsoft.com](mailto:бноakes@microsoft.com)

### **Role of the Microsoft Partner**

- Assist with preparation of project proposal by:
  - Understanding the Project Sponsor's business need
  - Provide ideas on technical possibilities to solve the business needs
  - Exploring design options
- Engage with Microsoft via Master Services Agreement and Work Order for each SPF project
- Communication
  - Weekly status reports on project
- Deliver projects by:
  - Helping build detailed specifications
  - Facilitate day to day project coordination
  - Ensure organizational standards are adhered to
  - Ensure interoperability goals are met
  - Delivering a system consistent with the specifications
- Assist with project promotion by:
  - Publishing links to SPF project on company web site

## Time Sheets

Microsoft Partner employees are subcontracted by Microsoft to work on SPF projects.

Nominated Partner staff will receive a status report and timesheet template via email from Barry Chami, who is responsible for the subcontractor process for Microsoft Enterprise Services Australia.

Partner staff must complete a weekly time sheet and email it weekly by **10am Monday for the previous week** to [barrych@microsoft.com](mailto:barrych@microsoft.com) and cc [ptyeso@microsoft.com](mailto:ptyeso@microsoft.com) or fax to (02) 9870 2680

## Invoicing

Partners subcontracted by Microsoft should complete an invoice corresponding to time sheets (fortnightly or monthly) and post to:

Dannielle Holder  
Tasmanian SPF Administration  
Level 10, Como Office Tower  
644 Chapel Street  
South Yarra VIC 3121

This process will assist in the prompt payment of invoices. Any invoice received by Tuesday will be processed for payment in the following Monday EFT run.

## Tracking Projects

Approved projects will be tracked during their execution for the community of interest. Partners undertaking projects must submit regular status reports that track progress against:

- Time estimates
- Resource estimates
- Cost estimates
- Risk assessment
- Other Issues

The SPF projects are likely to be short-running, limited scope & budget activities (typically costing \$100,000 or less). The frequency of update and the criticality of measurement will vary with the size of the project.

For projects that last more than two months, fortnightly updates are envisaged. Smaller projects should update their status weekly.

The Microsoft Partner should circulate status reports using the template attached as Appendix E to the Microsoft AM and Microsoft SEM by email.

## **SPF PROJECT PROMOTION**

### **Lessons Learned Report**

A Lessons Learned report may be produced for a project after the closedown meeting. Suggested topics to cover in the Lessons Learned Report are:

- What went well
- What we struggled with
- Project roles/responsibilities
- Business / People issues
- Project issues
- Suggestions for future SPF projects
- Beyond this project – impact on other initiatives?
- Technology Issues
- Notes for deployment
- Ensuring future SPF projects benefit from these learnings
- Next Steps
- Conclusion
- Appendix
  - Current Situation
  - Business Problems
  - Things to consider
  - Benefits of the project
  - Notes from Project Sponsor

The Microsoft AM is responsible for coordinating and publishing the report (with input from the Microsoft partner, the Executive Sponsor and the Microsoft SEM).

### **Written Case Study**

A written case study may be prepared for a completed project. The document contents should include:

- business situation
- solution

- technology
- architecture
- benefits

Content can be drawn from the Vision/Scope and Lessons Learned documents, as well as from interviews with both partner and customer stakeholders. The Executive Sponsor speech from checkpoint 3 can be used to obtain “quotes” for the written case study.

The Microsoft partner, the Microsoft consultant, the Executive Sponsor and the SPF Manager must all sign off a written case study before it is published. The Microsoft AM is responsible for coordinating and writing the document.

### **Video Case Study**

A video case study may be produced for some completed projects. The Microsoft partner, the Executive Sponsor and the Microsoft AM must all sign off the video case study before it is distributed.

### **Press Releases**

All press releases need to be coordinated through Microsoft and the Tasmanian Government.

Any publicity release will need the appropriate permission from Government project sponsors and Microsoft.

