

# Oakland County Department of Information Technology Project Scope and Approach

**Project Name: eForms Proof of Concept**

**Project ID: DE7188PC**

<b>Leadership Group: IT Steering Committee</b>			
<b>Department: Information Technology</b>		<b>Division: eGovernment</b>	
<b>Project Sponsor: Ed Poisson</b>	<b>Date Requested: 7/21/2006</b>	<b>PM Customer No. 188</b>	
<b>Request Type:</b>	<u><i>New Development</i></u>	<i>Enhancement</i>	<i>Customer Support</i>
	<i>Planned System Maintenance or Upgrade</i>		
<b>IT Team Name: eGov Program Services</b>		<b>IT Team No: E</b>	
<b>Project Manager/Leader: Jim Taylor</b>			
<b>Account Number:</b> 30004	<b>Account Description:</b> IT - eGovernment	<b>Customer Name:</b>	IT - eGovernment
<b>Grant Funded?</b> Yes <u>No</u>	<b>Mandate?</b> Yes <u>No</u>	<b>Mandate Source:</b>	

## Project Goal

Implement a proof of concept eForms project with two (2) forms from one or more departments so that web site form data can be electronically captured, stored, processed, and routed by TBD.

## Business Objective

The eForms project will improve customer (citizen) satisfaction by offering a less costly and more efficient alternative method for form entry, submission, and tracking, avoiding printing, writing and mailing the traditional paper forms. The solution will also significantly improve County employee efficiency and reduce County costs by providing paperless form information collection, tracking, storage and workflow processes.

### **Major Deliverables**

- Project Plan and Return on Investment
- Risk Management Plan
- Communication Plan
- Issue Logs
- Implemented Forms Solution
- Policies and Procedures
- Support Plan
- Marketing and Promotion Plan

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## **Approach**

- Gather and document pilot form requirements
- Evaluate solution alternatives based on requirements
- Conduct cost/benefit analysis of alternatives and recommend a solution
- Modify ROI projections and documentation
- Revise Project Plan
- Installation and configuration of Form Server environment
- Installation and configuration of database for information storage
- Integration with Netegrity for employee authentication
- Electronic conversion of 2 pilot forms
- Develop documentation and common forms component library
- Identify additional forms for future conversion
- Integration with production back-end information systems (if required)
- Develop a support plan
- Develop and document policies and procedures
- Develop administrator and end-user training materials
- Conduct user and technical training
- Launch eForm system
- Develop Marketing and Promotion Plan.
- Implement Marketing and Promotion Plan

## **Benefits**

***See Return on Investment (ROI) Analysis Document***

### **Intangible**

Upon its implementation, Oakland County will have a leading edge electronic form solution that provides the following benefits:

#### **Improved Service**

Service is enhanced for citizens due to the convenience and timeliness of online form reviewing, data entry, form submission and confirmation. The system eliminates citizens' expense and activities for printing and mailing the forms.

#### **Product/Service Accuracy**

Incidents of lost, misfiled, or misrouted files will be minimized or eliminated since all the form information is stored in the database rather than in physical paper. Data validation will ensure the most accurate and complete information is collected from the consumer which will speed processing of forms and reduce data entry errors and unnecessary correspondence.

#### **Product/Service Productivity**

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Eliminate the process of sending mail, receiving mail, organizing and storing paper forms and entering data to systems. Provide an easier way to analyze the form data and to generate reports. XML standards for storing information will assist with data exchange and transfer to other systems.

## **Impact**

**Number of Users** All Oakland County Citizens and web patrons.

**Divisions** One or more 'pilot' divisions.

**Leadership Groups** ALL

## **Risk**

**Business Environment** **Low** little or no impact to existing business processes.

**Technical Environment** **Low** proven and previously implemented technologies.

## **Assumptions**

**Staffing** IT Staffing: resources will be available for the hours indicated per the attached project plan.

Other Staffing: additional staffing will be available as follows:

<b><u>Role:</u></b>	<b><u>Name</u></b>	<b><u>Hours per Day</u></b>
Project Sponsor:	Ed Poisson	TBD
Project Manager:	Jim Taylor	TBD
Project Lead:	TBD	TBD
Administrator:	TBD	TBD

## **Facilities**

- Current work areas will be used to support the staff required to implement this project.

## **Technical**

- Oakland County ecommerce web services are assumed to be in place when implementing any forms that require online payment.

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**Funding**

- Services: eGovernment program services allocation.
- Software: TBD
- Hardware: TBD

**Other**

- None

**Priority - To be determined**

**Constraints**

- Project is limited to two (2) forms, from one or more departments.

**Exclusions**

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## PROJECT PHASE AUTHORIZATION

<b>Phase(s):</b>	
<b>Total Estimated Application Services</b>	<b>Hours: Cost:</b>
<b>Total Estimated Technical Systems</b>	<b>Hours: 86 Cost: \$ 7,320</b>
<b>Total Estimated eGovernment Services</b>	<b>Hours: 989 Cost: \$ 120,658</b>
<b>Total Estimated CLEMIS</b>	<b>Hours: Cost:</b>
<b>Total Estimated Internal Services</b>	<b>Hours: Cost:</b>
<b>IT Application Services Division Manager Approval:</b>	<b>Date:</b>
<b>IT Technical Systems Division Manager Approval:</b>	<b>Date:</b>
<b>IT eGovernment Services Division Manager Approval:</b>	<b>Date:</b>
<b>IT CLEMIS Division Manager Approval:</b>	<b>Date:</b>
<b>IT Internal Services Division Manager Approval:</b>	<b>Date:</b>
<b>IT Resource Manager Approval:</b>	<b>Date:</b>
<b>IT Resource Manager Approval:</b>	<b>Date:</b>
<b>IT Resource Manager Approval:</b>	<b>Date:</b>
<b>IT Resource Manager Approval:</b>	<b>Date:</b>
<b>IT Resource Manager Approval:</b>	<b>Date:</b>
<b>IT Management Approval:</b>	
Approved:            Yes            No	<b>Date:</b>
Reason:	
<b>Project Sponsor Approval:</b>	
Title:	<b>Date:</b>

## PROJECT SUMMARY

<b>Authorized Development (see above)</b>	<b>Hours: 1075</b>	<b>Cost: \$ 127,978</b>
<b>Preliminary Estimated Development for Future Phases</b>	<b>Hours:</b>	<b>Cost:</b>
<b>Grand Total Estimated Development</b>	<b>Hours: 1075</b>	<b>Cost: \$ 127,978</b>

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**PROJECT COMPLETION AUTHORIZATION**

<b>Customer Acceptance of Product:</b>	
Title:	Date:
<b>Project Office Review:</b>	Date:

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Open Workbench - [eForms Proof of Concept - Size Estimate (+/- 10% to 50%)]

File Edit View Tools Window Help

[All Resources]

Type	ID	Task Name	Estimated Hours	Estimated Cost	Estimate Notes
Phase	000000	PROJECT MANAGEMENT	345	\$42,090.	
Phase	0000001	PROJECT PLANNING AND CONTROL	40	\$4,880.0	
Phase	030000	BUSINESS AREA REQUIREMENTS	20	\$2,440.0	
Phase	040000	BUSINESS SYSTEM DESIGN	80	\$9,760.0	
Phase	050000	TECHNICAL DESIGN, INSTALL & PROGRAM	397	\$45,262.	
Phase	060000-0	EDUCATION, MARKETING, POLICIES	180	\$21,960.	
Phase	070000	IMPLEMENTATION	5	\$610.00	
Phase	080000	POST IMPLEMENTATION SUPPORT	8	\$976.00	
			1,075	\$127,978.0	

For Help, press F1 | Task Type not equal to Milestone | CAP NUM

*Project Summary*

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
<b>Benefits/Savings:</b>							
Tangible Benefits Subtotal:	50,475	50,475	50,475	50,475	50,475	50,475	302,850
Cost Avoidance Subtotal:	563	563	563	563	563	563	3,375
<b>Costs:</b>							
Development Services Subtotal:	168,954	8,296	8,296	8,296	8,296	8,296	210,434
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	105,513	19,358	19,358	19,358	19,358	19,358	202,303
Infrastructure Subtotal:	16,850	3,850	3,850	3,850	3,850	3,850	36,100
Training Subtotal:	0	0	0	0	0	0	0
Other Subtotal:	0	0	0	0	0	0	0
<b>Annual Statistics:</b>							
Annual Total Savings	51,038	51,038	51,038	51,038	51,038	51,038	306,225
Annual Total Costs	291,317	31,504	31,504	31,504	31,504	31,504	448,837
Annual Return on Investment	(240,280)	19,534	19,534	19,534	19,534	19,534	(142,612)
Annual Costs/Savings Ratio	570.79%	61.73%	61.73%	61.73%	61.73%	61.73%	
<b>Project Cumulative Statistics:</b>							
Cumulative Total Savings	51,038	102,075	153,113	204,150	255,188	306,225	306,225
Cumulative Total Costs	291,317	322,821	354,325	385,829	417,333	448,837	448,837
Cumulative Return on Investment	(240,280)	(220,746)	(201,213)	(181,679)	(162,146)	(142,612)	(142,612)
Cumulative Cost/Savings Ratio	570.79%	316.26%	231.41%	188.99%	163.54%	146.57%	146.57%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							
<b>Signatures:</b>							
Benefits Reviewed By Project Sponsor	Date: _____						
Costs (including IT Resources) Reviewed By Information Technology Project Manager	Date: _____						
Costs (including IT Resources) Reviewed By Technical Services Manager	Date: _____						



**Oakland County -- eForm Proof of Concept**  
Return on Investment Analysis

*Savings Detail*

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Staff Time Savings	Tangible Benefit	x	x	x	x	x	x	7,500	7,500	7,500	7,500	7,500	7,500
Enhanced Access fees	Tangible Benefit	x	x	x	x	x	x	1,500	1,500	1,500	1,500	1,500	1,500
Citizen Postage, Envelope	Tangible Benefit	x	x	x	x	x	x	1,500	1,500	1,500	1,500	1,500	1,500
Citizen Time Savings	Tangible Benefit	x	x	x	x	x	x	3,375	3,375	3,375	3,375	3,375	3,375
Application Development Time Savings	Tangible Benefit	x	x	x	x	x	x	36,600	36,600	36,600	36,600	36,600	36,600
Postage County, Envelope	Cost Avoidance	x	x	x	x	x	x	563	563	563	563	563	563



**Oakland County -- eForm Proof of Concept**  
Return on Investment Analysis

*Cost Detail*

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier
IT Hours - New Development	Development Svcs		HR	989	122	120,658	
IT Hours - System Maintenance	Development Svcs		HR	68	122	8,296	
IT Hours - Tech Services SA				26	41	1,066	
IT Hours - Tech Services SA Maint					41	0	
IT Hours - Tech Services DB				60	122	7,320	
User Hours - New Development	Development Svcs					0	
User Hours - PTNE/OT	Development Svcs					0	
Contractor Professional Services	Development Svcs			1	40,000	40,000	
PC System - Acquisition	Hardware					0	
PC System - Maintenance	Hardware				2,304	0	
Notebook - Acquisition	Hardware					0	
Notebook - Maintenance	Hardware				2,372	0	
Mini Notebook - Acquisition	Hardware					0	
Mini Notebook - Maintenance	Hardware				2,196	0	
Laserprinter 1 - Acquisition	Hardware					0	
Laserprinter 1 - Maintenance	Hardware				1,104	0	
Laserprinter 2 - Acquisition	Hardware					0	
Laserprinter 2 - Maintenance	Hardware				1,208	0	
Laserprinter 3 - Acquisition	Hardware					0	
Laserprinter 3 - Maintenance	Hardware				1,860	0	
Image Workstations - Acquisition	Hardware					0	
Image Workstations - Maintenance	Hardware				3,496	0	
Terminals - Acquisition	Hardware					0	
Terminals - Maintenance	Hardware				644	0	
PRTR w/TERM ID - Acquisition	Hardware					0	
PRTR w/TERM ID - Maintenance	Hardware				1,072	0	
PRTR w/o TERM ID - Acquisition	Hardware					0	
PRTR w/o TERM ID - Maintenance	Hardware				1,072	0	
PC Maintenance User Owned	Hardware				2,304	0	
Printer Maintenance User Owned	Hardware				1,072	0	
Package Software - Acquisition	Software					0	
Package Software - Maintenance	Software					0	
Business Objects Access	Software					0	

**Oakland County -- eForm Proof of Concept**  
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*Cost Detail*

<b>Cost Description</b>	<b>Project Cost Category</b>	<b>Budget Category/Funding Source</b>	<b>Unit Desc</b>	<b>Units</b>	<b>Rate per Unit</b>	<b>Total Cost</b>	<b>Annual Multiplier</b>
Term Emulation SFTW-Acquisition	Software					0	
Term Emulation SFTW-Maintenance	Software					0	
Server - Acquisition/Upgrade	Infrastructure			2	6,500	13,000	
Server - Maintenance	Infrastructure			2	1,925	3,850	
Server Sftwre - Acquisition/Upgrade	Infrastructure		EA	1	86,155	86,155	
Server Sftwre - Maintenance	Infrastructure		ANN	1	19,358	19,358	
TBD	Infrastructure					0	
TBD	Infrastructure					0	
TBD	Infrastructure					0	
TBD	Infrastructure					0	
Internet Access	Infrastructure				180	0	
Project Staff Training	Training					0	
User Training	Training					0	
						0	
						0	
						0	
						0	
						0	

**Oakland County -- eForm Proof of Concept**  
Return on Investment Analysis

*Cost Detail*

Cost Description	Project Cost Category	Affects Project ROI?						Potential Cost Extensions						
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6	
IT Hours - New Development	Development Svcs	x						120,658						
IT Hours - System Maintenance	Development Svcs	x	x	x	x	x	x	8,296	8,296	8,296	8,296	8,296	8,296	
IT Hours - Tech Services SA														
IT Hours - Tech Services SA Maint														
IT Hours - Tech Services DB														
User Hours - New Development	Development Svcs													
User Hours - PTNE/OT	Development Svcs													
Contractor Professional Services	Development Svcs	x						40,000						
PC System - Acquisition	Hardware													
PC System - Maintenance	Hardware													
Notebook - Acquisition	Hardware													
Notebook - Maintenance	Hardware													
Mini Notebook - Acquisition	Hardware													
Mini Notebook - Maintenance	Hardware													
Laserprinter 1 - Acquisition	Hardware													
Laserprinter 1 - Maintenance	Hardware													
Laserprinter 2 - Acquisition	Hardware													
Laserprinter 2 - Maintenance	Hardware													
Laserprinter 3 - Acquisition	Hardware													
Laserprinter 3 - Maintenance	Hardware													
Image Workstations - Acquisition	Hardware													
Image Workstations - Maintenance	Hardware													
Terminals - Acquisition	Hardware													
Terminals - Maintenance	Hardware													
PRTR w/TERM ID - Acquisition	Hardware													
PRTR w/TERM ID - Maintenance	Hardware													
PRTR w/o TERM ID - Acquisition	Hardware													
PRTR w/o TERM ID - Maintenance	Hardware													
PC Maintenance User Owned	Hardware													
Printer Maintenance User Owned	Hardware													
Package Software - Acquisition	Software													
Package Software - Maintenance	Software													
Business Objects Access	Software													

**Oakland County -- eForm Proof of Concept**  
Return on Investment Analysis

*Cost Detail*

Cost Description	Project Cost Category	Affects Project ROI?						Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Term Emulation SFTW-Acquisition	Software												
Term Emulation SFTW-Maintenance	Software												
Server - Acquisition/Upgrade	Infrastructure	x						13,000					
Server - Maintenance	Infrastructure	x	x	x	x	x	x	3,850	3,850	3,850	3,850	3,850	3,850
Server Sftwre - Acquisition/Upgrade	Infrastructure	x						86,155					
Server Sftwre - Maintenance	Infrastructure	x	x	x	x	x	x	19,358	19,358	19,358	19,358	19,358	19,358
TBD	Infrastructure												
TBD	Infrastructure												
TBD	Infrastructure												
TBD	Infrastructure												
Internet Access	Infrastructure												
Project Staff Training	Training												
User Training	Training												

**Oakland County -- eForm Proof of Concept**  
Return on Investment Analysis

*Cost Summary*

<b>Cost Description</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>	<b>Total</b>
<b>Development Services:</b>							
IT Hours - New Development	120,658						120,658
IT Hours - System Maintenance	8,296	8,296	8,296	8,296	8,296	8,296	49,776
IT Hours - Tech Services SA							
IT Hours - Tech Services SA Maint							
IT Hours - Tech Services DB							
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services	40,000						40,000
<i>Development Services Subtotal:</i>	<b>168,954</b>	<b>8,296</b>	<b>8,296</b>	<b>8,296</b>	<b>8,296</b>	<b>8,296</b>	<b>210,434</b>
<b>Hardware:</b>							
<i>Hardware Subtotal:</i>							
<b>Software:</b>							
Server Sftwre - Acquisition/Upgrade	86,155						86,155
Server - Maintenance	19,358	19,358	19,358	19,358	19,358	19,358	116,148
<i>Software Subtotal:</i>	<b>105,513</b>	<b>19,358</b>	<b>19,358</b>	<b>19,358</b>	<b>19,358</b>	<b>19,358</b>	<b>202,303</b>
<b>Infrastructure:</b>							
Server - Acquisition/Upgrade	13,000						13,000
Server - Maintenance	3,850	3,850	3,850	3,850	3,850	3,850	23,100
<i>Infrastructure Subtotal</i>	<b>16,850</b>	<b>3,850</b>	<b>3,850</b>	<b>3,850</b>	<b>3,850</b>	<b>3,850</b>	<b>36,100</b>
<b>Training:</b>							
<i>Training Subtotal:</i>							
<b>Other:</b>							
<i>Other Subtotal:</i>							
<b>Costs Total:</b>	<b>291,317</b>	<b>31,504</b>	<b>31,504</b>	<b>31,504</b>	<b>31,504</b>	<b>31,504</b>	<b>448,837</b>

**Oakland County -- eForm Proof of Concept**  
Return on Investment Analysis

### Assumptions

Date	Assumption Description
19-Jul-06	Software Costs = \$86,155
19-Jul-06	Software Support = \$19,358
	- Adobe Forms Server \$32,000 +\$7,200 maintenance
	- Adobe Designer (6 copies) \$2,155 + \$458 maintenance
	- Adobe Workflow Server \$24,000 + \$5,400 Maintenance
	- Adobe Forms Manager \$28,000 + \$6,300 Maintenance
19-Jul-06	Form Assumptions.
	- 2 Pilot forms that are TDB. eGov has a short list of 30.
	- Volume of each form is 1,000/annually (Average volume of forms on short list is 1000/year)
	- assumed that on average over the 6 years, 75% of the forms will be processed online and the rest in paper form
	- Total annual eForm Volume = 1,500 ((1000+1000) * 75%)
19-Jul-06	Employee, citizen and developer Savings
	- Oakland County Median Household Buying Income \$52,198. $\$52,198/1960 \text{ workable hours}=26.63/\text{hour}/60=44/\text{min} * 5 = \$2.25$
	- 2004 Clerk I - Base 0 Salary with Fringe Grade 3 hourly Salary 18/hour. Estimated time savings per form (gathering, data entry, validation, customer inquiry, customer correspondence...)=12 min. Estimated Workflow savings=5 min ----- 17 minutes~\$5 IBM estimates costs of a single paper form per organization to be \$30-\$165. Gartner estimates A form you can fillout online, sign and submit has a savings of \$97/form
	Utilization of electronic forms designer will reduce web form Java development by 80%. 300 hours * \$122/hour
	Seventy Five Percent of estimated eForm volume would require return correspondence involving postage 1125
	Estimated number of eForms that require fee associated with submission=50%, estimated enhanced access fee per form \$2.00, 750 annual forms at \$2.00. Based prior analysis of Access Oakland products, transactions and credit card fees.
	Professional Services = assume 40,000 in professional services form Adobe consultants.
	2 Servers
	Initial Cost - 13 hours setup new server (13hours * \$122 = \$1586)
	Initial Cost - \$6500 Server hardware
	Annual Cost - 8 hours annual maintenance (8hours * \$122= \$976)
	Annual Cost - \$1500 Annual backup costs
	Annual Cost - \$425 Annual OS Virus Software