State of Montana Project Management Advisory Workgroup
Minutes
October 18, 2017
3:00 p.m.
Cogswell, Room 151

Members Present:

Bill Jarocki, DOR – Chair   Jennifer Schofield, SITSD – Alternate
Tina Ciarmoli Wilson, FWP   ⏣ Sky Foster, AGR
Jerry Kozak, BCC   ⏣ Cory Mabry, DLI
Jerry LaChere, MDT   ⏣ Tammy Stuart, LEG
Michael Sweeney, OPI

Guests Present: Corey Kaufman, John Bunker, Greg Smith, Maura Gruber

⏣ **Real-time Communication**: Greg Thomas

Welcome

- Bill Jarocki welcomed the workgroup to the October 18, 2017 State of Montana Project Management Advisory Workgroup (SMPMAW) meeting.
- Next month's meeting
  - o Mr. Jarocki will be unable to attend
  - o Need a temporary Chair
  - o Need topics – email Mr. Jarocki at BJarocki@mt.gov with suggestions

Minutes

- **Motion:** Jerry LaChere made a motion to approve the September 20, 2017 minutes. Michael Sweeney seconded the motion. Motion carried.

Business

- SABHRS Capabilities
  - o Can we utilize SABHRS to obtain true costs of projects?
  - o What do you want to track and how much detail do you want?
  - o Task Profile
    - All employees have this
    - One for each project
    - Can charge to a project
    - Level Combination
      - State Information Technology Services Division (SITSD)
      - Department of Environmental Quality (DEQ)
      - Track time for different profiles and different tasks
        - o Within a project
      - Page two of the SABHRS Timesheet Capabilities handout
      - Will not allow you to split fund
        - o Charge time to one combo code
    - Projects grant field
      - Indicate project for financial
    - Concern related to reporting hours and actual costs
    - Corrections in reporting
      - Time tracking
        - o Education from the supervisors to employee
    - Struggle = having managers use the reporting structure
      - Identify clear and concise task profiles

- - Level 2 and 3 can be detail codes
  - o SABHRS has the functionality
    - ▪ Building the structure takes time
  - o Agency implementation
    - ▪ Submit a change request to SABHRS
    - ▪ Accounting, Budget, HR, and all other employees need to be in the meeting
    - ▪ A link to the form will be provided
  - o Budget vs Project Need
    - ▪ Budget is familiar with combo codes
      - • Split funding may be the concern
  - o PM get information out of SABHRS
    - ▪ Request a report, can be customized
  - o How do we track what deliverables have been accomplished?
    - ▪ Levels can identify activity
    - ▪ Comments field in the timesheet
  - o Hours and Dollars
    - ▪ Combo codes help this reporting
    - ▪ Position expenditure budget report
  - o Test environment will be helpful in implementation
  - o **Action Item:** CIO Support will post the SABHRS Capabilities Timesheet to the [SMPMAW](#) website
  - o Submit questions to Corey Kaufman or CKaufman@mt.gov or John Bunker at Jobunker@mt.gov.
- Legislative Finance Committee (LFC) Wrap-Up
  - o Meeting went well
  - o Questions raised were focused on over budget or past schedule delivery
  - o Post-Implementation report was discussed
    - ▪ Email was distributed on 10/3/2017 regarding this topic
  - o Submit questions to Jennifer Schofield at JSchofield@mt.gov.
- Earned Value/Planned Value and Accuracy in Reporting
  - o Are there any questions?
  - o Reach out if you need assistance
  - o Submit questions to Ms. Schofield at JSchofield@mt.gov.

Discussion
- Member Forum
- Public Comment
- Future Agenda Topics
  - o Supplemental Report Review
  - o Post-Implementation Report Review
  - o Mr. LaChere will chair the November Meeting
  - o **Action Item:** Jennifer Schofield will reach out to LFC reporting agencies and request one of them to report on their Supplemental and/or Post Implementation Report.

Next Meeting
- November 15, 2017
  3:00 p.m. to 4:00 p.m.
  Cogswell, Room 151

Adjournment
- The meeting adjourned at 4:00 p.m.