ERP Project Roles and Responsibilities

Tyler executive management has indirect involvement with the Project and is part of the Tyler escalation process. This team member offers additional support to the Project team and collaborates with other Tyler department managers as needed in order to escalate and facilitate implementation Project tasks and decisions.

- Provides clear direction for Tyler staff on executing on the Project Deliverables to align with satisfying County 's overall organizational strategy.
- Authorizes required Project resources.
- Resolves all decisions and/or issues not resolved at the implementation management level as part of the escalation process.
- Acts as the counterpart to County 's executive sponsor.

Name	Job Title	Key Personnel
Cheryl Polymeros	Sr. Implementation Director	No
Jennifer Turgeon	V.P. Implementation	No

1.1.1 Tyler Implementation Manager

- Tyler implementation management has indirect involvement with the Project and is part of the Tyler escalation process. The Tyler project managers consult implementation management on issues and outstanding decisions critical to the Project. Implementation management works toward a solution with the Tyler Project Manager or with County management as appropriate. Tyler executive management is the escalation point for any issues not resolved at this level.
- Assigns Tyler Project personnel.
- Provides support for the Project team.
- Provides management support for the Project to ensure it is staffed appropriately and staff have necessary resources.
- Monitors Project progress including progress towards agreed upon goals and objectives.

Name	Job Title	Key Personnel
Jane Grant	Implementation Director	No

1.1.2 Tyler Project Manager (50% dedicated)

The Tyler project manager(s) provides oversight of the Project, coordination of Tyler resources between departments, management of the Project budget and schedule, effective risk and issue management, and is the primary point of contact for all Project related items. As requested by the client, the Tyler Project

Manager provides regular updates to the client Steering Committee and other Tyler governance members.

The County's project includes a 50% dedicated Tyler Project Manager. This role allows for closer monitoring and involvement in the overall project. The Tyler Project Manager will dedicate an average of 20 hours per week to this project, excluding approved paid time off, and will respond to County emails and messages based on priority of items in a timely manner and normal correspondences within the same business day, unless out of the office.

Tyler Project Manager's role includes responsibilities in the following areas:

1.1.2.1 Contract Management

- Validates contract compliance throughout the Project.
- Ensures Deliverables meet contract requirements.
- Acts as primary point of contact for all contract and invoicing questions.
- Prepares and presents contract milestone sign-offs for acceptance by County project manager(s).
- Coordinates Change Requests, if needed, to ensure proper Scope and budgetary compliance.

1.1.2.2 Planning

- Delivers project planning documents.
- Defines Project tasks and resource requirements.
- Develops initial Project schedule and Project Management Plan.
- Collaborates with County project manager(s) to plan and schedule Project timelines to achieve on-time implementation.

1.1.2.3 Risk Management

- Develop risk register with the County Project Team
- Monitor and maintain risk register with County Project Manager
- Proactively notify County as risks change or begin to develop
- Provide guidance to County on methods for handling risk

1.1.2.4 Implementation Management

- Provides bi-weekly status reports; weekly starting 90 days prior to go-live
- Facilitates bi-weekly status meetings with the County Project Team
- Provides monthly executive status report to include status indicators of key tasks and work packages, high priority open items, and barriers to success or meeting project goals, as outlined in this SOW.
- On-site once (up to 2 days) per month when travel restrictions are lifted and it is safe to travel.
- Attends steering committee meetings monthly (on-site if coinciding with scheduled monthly visit)
- Provides availability for ad-hoc project meetings and sessions
- Provides oversight and is engaged in key project tasks such as solution validation, go-live planning and go-live processing
- Tightly manages Scope and budget of Project to ensure Scope changes and budget planned versus actual are transparent and handled effectively and efficiently.

- Establishes and manages a schedule and Tyler resources that properly support the Project Schedule and are also in balance with Scope/budget.
- Establishes risk/issue tracking/reporting process between County and Tyler and takes all necessary steps to proactively mitigate these items or communicate with transparency to County any items that may impact the outcomes of the Project.
- Collaborates with County 's project manager(s) to establish key business drivers and success indicators that will help to govern Project activities and key decisions to ensure a quality outcome of the project.
- Collaborates with County 's project manager(s) to set a routine communication plan that will aide all Project team members, of both County and Tyler, in understanding the goals, objectives, current status, and health of the Project.

1.1.2.5 Resource Management

- Acts as liaison between Project team and Tyler manager(s).
- Observes scheduled training and implementation sessions for oversight once a month per phase of the project.
- Identifies and coordinates all Tyler resources across all applications, Phases, and activities including development, forms, installation, reports, implementation, and billing.
- Provides direction and support to Project team.
- Manages the appropriate assignment and timely completion of tasks as defined in the Project Schedule, task list, and Go-Live Checklist.
- Assesses team performance and adjusts as necessary.
- Consulted on in-scope 3rd party providers to align activities with ongoing Project tasks.

Name	Job Title	Key Personnel
Dee Packer	Project Manager	Yes

Assignment of project team is made upon contract signing. The named Project Manager and Implementation Consultants will be assigned to the project if a contract is executed by June 30, 2021.

1.1.3 County Executive Sponsor

The County executive sponsor provides support to the Project by providing strategic direction and communicating key issues about the Project and its overall importance to the organization. When called upon, the executive sponsor also acts as the final authority on all escalated Project issues. The executive sponsor engages in the Project, as needed, in order to provide necessary support, oversight, guidance, and escalation, but does not participate in day-to-day Project activities. The executive sponsor empowers the County steering committee, project manager(s), and functional leads to make critical business decisions for County.

- Champions the project at the executive level to secure buy-in.
- Authorizes required project resources.
- Actively participates in organizational change communications.

Name	Job Title	Email	Phone
Jenifer Ellin	Director of Fiscal & Administrative Services	ellinj@charlescountymd.gov	301-645-0569

1.1.4 County Steering Committee

The County steering committee understands and supports the cultural change necessary for the Project and fosters an appreciation for the Project's value throughout the organization. The steering committee oversees the County project manager and Project as a whole through participation in regular internal meetings. The County steering committee remains updated on all Project progress, Project decisions, and achievement of Project milestones. The County steering committee also serves as primary level of issue resolution for the Project.

- Works to resolve all decisions and/or issues not resolved at the project manager level as part of the escalation process.
- Attends all scheduled steering committee meetings.
- Provides support for the project team.
- Assists with communicating key project messages throughout the organization.
- Prioritizes the project within the organization.
- Ensures the project staffed appropriately and that staff have necessary resources.
- Monitors project progress including progress towards agreed upon goals and objectives.
- Has the authority to approve or deny changes impacting the following areas:
  - Cost
  - Scope
  - Schedule
  - Project Goals
  - County Policies
  - Needs of other client projects

Name	Job Title	Email	Phone
Evelyn Jacobson	Chief Information Officer	jacobsoe@charlescountymd.gov	301-645-0713
Jake Dyer	Chief of Budget	dyerj@charlescountymd.gov	301-645-0572
Bill DeAtley	Chief of Accounting	deatleyw@charlescountymd.gov	301-645-0567
Shanna Reese	Chief of Purchasing	reeses@charlescountymd.gov	301-645-0658
Eric Jackson	Chief of Treasury	jacksone@charlescountymd.gov	301-645-0712
Megan Donnick	Assistant Director of Human Resources	donnickm@charlescountymd.gov	301-645-0503

1.1.5 County Project Manager

County shall assign project manager(s) prior to the start of this project with overall responsibility and authority to make decisions related to Project Scope, scheduling, and task assignment. County Project Manager should communicate decisions and commitments to the Tyler project manager(s) in a timely and efficient manner. When County project manager(s) do not have the knowledge or authority to make decisions, he or she engages the necessary resources to participate in discussions and make decisions in a timely fashion to avoid Project delays. The client project manager(s) are responsible for reporting to client steering committee and determining appropriate escalation points.

1.1.5.1 Contract Management

- Validates contract compliance throughout the project.
- Ensures that invoicing and Deliverables meet contract requirements.
- Acts as primary point of contact for all contract and invoicing questions. Collaborates on and approves Change Requests, if needed, to ensure proper scope and budgetary compliance.

1.1.5.2 Planning

- Reviews and accepts project planning documents.
- Defines project tasks and resource requirements for County project team.
- Collaborates in the development and approval of the project schedule.
- Collaborates with Tyler project manager(s) to plan and schedule project timelines to achieve on-time implementation.

1.1.5.3 Implementation Management

- Tightly manages project budget and scope.
- Collaborates with Tyler project manager(s) to establish a process and approval matrix to ensure that scope changes and budget (planned versus actual) are transparent and handled effectively and efficiently.
- Collaborates with Tyler project manager to establish and manage a schedule and resource plan that properly supports the project schedule as a whole and is also in balance with scope and budget.
- Collaborates with Tyler project manager(s) to establish risk and issue tracking and reporting process between County and Tyler and takes all necessary steps to proactively mitigate these items or communicate with transparency to Tyler any items that may impact the outcomes of the project.
- Collaborates with Tyler project manager(s) to establish key business drivers and success indicators that will help to govern project activities and key decisions to ensure a quality outcome of the project.
- Routinely communicates with both County staff and Tyler, aiding in the understanding of goals, objectives, current status, and health of the project by all team members.
- Manages the requirements gathering process and ensure timely and quality business requirements are being provided to Tyler.

1.1.5.4 Resource Management

- Acts as liaison between project team and stakeholders.

- Identifies and coordinates all County resources across all modules, phases, and activities including data conversions, forms design, hardware and software installation, reports building, and satisfying invoices.
- Provides direction and support to project team.
- Builds partnerships among the various stakeholders, negotiating authority to move the project forward.
- Manages the appropriate assignment and timely completion of tasks as defined.
- Assesses team performance and takes corrective action, if needed.
- Provides guidance to County technical teams to ensure appropriate response and collaboration with Tyler Technical Support Teams in order to ensure timely response and appropriate resolution.
- Owns the relationship with in-Scope 3rd party providers and aligns activities with ongoing project tasks.
- Ensures that users have appropriate access to Tyler project toolsets as required.
- Conducts training on proper use of toolsets.
- Validates completion of required assignments using toolsets.

1.1.5.5 Organizational Change Management

- Validates that users receive timely and thorough communication regarding process changes.
- Provides coaching to supervisors to prepare them to support users through the project changes.
- Identifies the impact areas resulting from project activities and develops a plan to address them proactively.
- Identifies areas of resistance and develops a plan to reinforce the change.
- Monitors post-production performance and new process adherence.

Name	Job Title	Email	Phone
Adair Hocking	Project Manager	hockinga@charlescountymd.gov	301-645-0546
Evelyn Jacobson	Chief Information Officer	jacobsoe@charlescountymd.gov	301-645-0713