



Business and Operations Advisory Committee

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Prepared for:
NATIONAL SCIENCE FOUNDATION
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Why iTRAK

TRAK Benefits

Management Insight

- Enhances program management reporting
- Improves access to and availability of more detailed information
- Improves data quality

Operational Excellence

- Simplifies and standardizes business processes
- Increases automation of business processes and technology upgrades
- Integrates data and processes

Control & Compliance

- Enables greater transparency
- Automates internal controls
- Enhances ability to comply with reporting regulations

iTRAK Implementation

- iTRAK went live on 10-14-2014, on schedule and within budget
- Factors that contributed to iTRAK's successful implementation include:
 - Broad Perspective
 - Technology - Leveraged a cloud-based COTS financial system solution and followed a proven methodology and streamlined approach to integrate iTRAK with NSF's internal and external systems.
 - People - Developed a robust change management program that took into consideration the NSF culture.
 - Business Process - Modified NSF's business processes to align with the COTS business process model and did not customize the system
 - Data – executed a rigorous data preparation and cleansing program prior to migrating data into iTRAK
 - Visible Executive Support and Involvement
 - Collaboration - Partnership among the BFA and OIRM organizations, and the NSF program offices.

iTRAK Size and Impact

iTRAK HAS PROCESSED

OVER **80,939** PAYMENTS

TOTALING **\$813M**

\$491M

HAS BEEN COMMITTED or
OBLIGATED IN iTRAK
IN SUPPORT OF THE NSF MISSION

TRAINED

460+ USERS

IN MORE THAN **100**
CLASSROOM SESSIONS

iTRAK COMMAND CENTER

HAS OPERATED FOR **2** Months

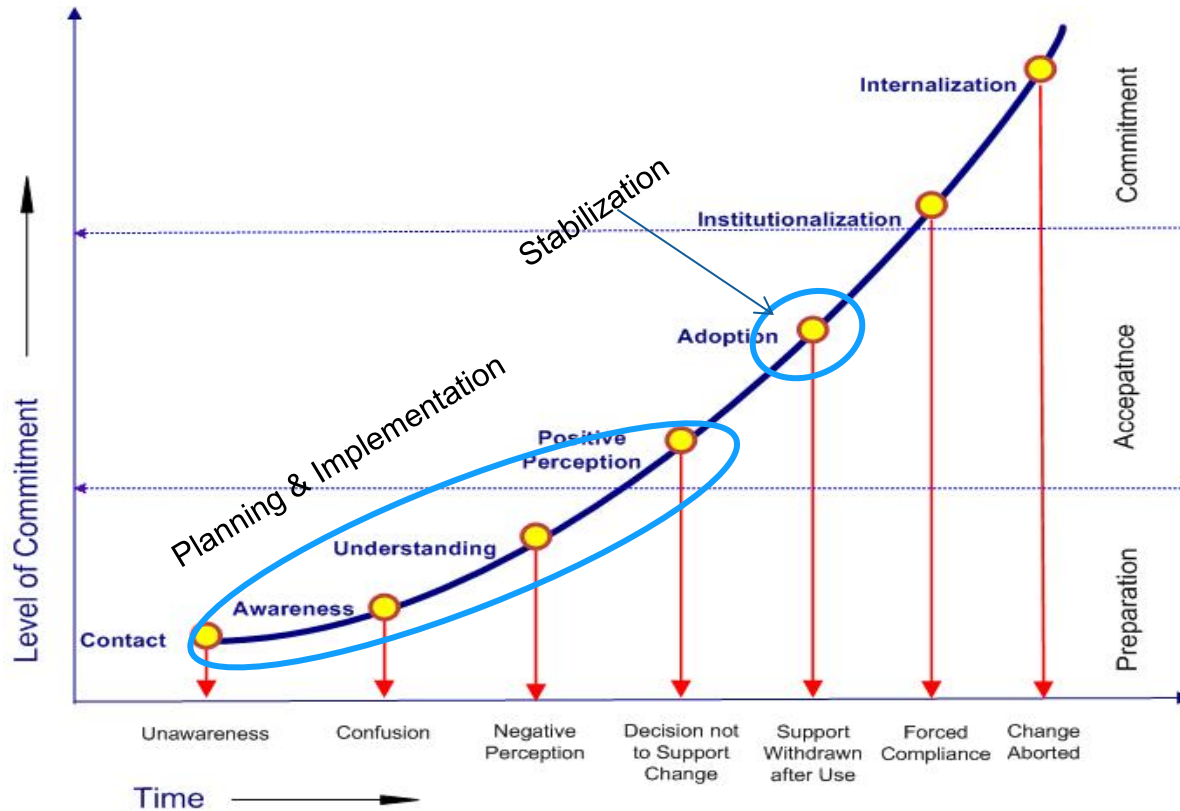
SUPPORTING **400+** USER VISITS



The iTRAK Change Management Strategy framework considers three overarching objectives, supported by nine key activity areas

Objective	Activity Area	Summary of Actions and Benefits
1. Lead and Build Buy-In	Change Strategy	<ul style="list-style-type: none"> • Define vision and drivers for change and develop strategy for change • Establish clear need for change and direction for implementing change
	Change Leadership	<ul style="list-style-type: none"> • Support leadership early and throughout the project in managing change • Maintain consistent leadership advocacy and celebrate successes
	Stakeholder Engagement	<ul style="list-style-type: none"> • Engage stakeholders early and throughout the project • Develop a feeling of being invested in the new system and process
	Communications	<ul style="list-style-type: none"> • Deliver the right messages at the right time through the right channels • Build buy-in to change and understanding of new roles and responsibilities
2. Understand Impact and Build Capability	Business Process	<ul style="list-style-type: none"> • Assess how iTRAK will affect business processes • Enable adaptation of processes and development of process training
	Workforce	<ul style="list-style-type: none"> • Assess how iTRAK will affect workforce roles and responsibilities • Enable adaptation of organization/workforce and development of training
	Training	<ul style="list-style-type: none"> • Train workforce in new system, business processes, and roles • Enable workforce to successfully operate once iTRAK is deployed
3. Measure and Manage	Performance Management	<ul style="list-style-type: none"> • Measure change progress and evaluate change management performance • Enable continual improvement of change management approaches
	Project Management	<ul style="list-style-type: none"> • Integrate change management activities into the overarching iTRAK project • Enable effective management of change management efforts

“Change Curve”



- Communications are targeted to bring stakeholders through the “Change Curve”
- Questionnaires are used to measure progress toward acceptance and commitment

iTRAK Questionnaire Overview

- Four Stakeholder Questionnaires conducted during Planning and Implementation
 - Assess the effectiveness of iTRAK outreach and communication activities
 - Collect feedback on stakeholder awareness, understanding, and perception of the iTRAK effort
 - Determine areas to focus future iTRAK outreach and communication efforts
- Previous Questionnaire Results
 - Demonstrated increased awareness and understanding of iTRAK over time
 - Provided information on how stakeholders prefer to receive information
 - Revealed that stakeholders felt there was a need for iTRAK
 - Reported that stakeholders were not sure how iTRAK would impact their work
 - Identified differences in achieving the target commitment within various Divisions
- Now that iTRAK is deployed, we will continue to collect information about how stakeholders are adopting the new system and business processes

Stabilization Questionnaire

- Measure stakeholder adoption of iTRAK
 - Frequency of use
 - Impacts to ability to perform job functions
 - Impact on overall work, role, and responsibilities
- Understand perception of iTRAK
 - Are benefits understood
- Measure value of the resources provided to facilitate adoption
 - Command Center
 - Change Champions
 - iTRAK SharePoint Site
 - ITRAK Help Desk
- Seek input for continuous improvement

What we need from the B&O

- Provide feedback on the planned questionnaire that will be used to measure how users are adapting to the new business processes and the new system.
- What other tools should the communications team consider.
- What other type of outreach activities should the iTRAK communication team consider.